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ABSTRACT

This manual is designed to train individuals to deliver courses developed within the National Training System of the National Institute on Drug Abuse (NIDA). The training guide, describes the content and activities that constitute training delivery, identifies behaviors and skills associated with training delivery, elaborates on program design and modification, and provides opportunities for participants to refine skills for effective training delivery. The materials contain 10 modules focusing on: (1) adult learning theory; (2) small group process-the learning environment; (3) trainer style; (4) cultural considerations in training; (5) methods and media used in course delivery; (6) the processing of learning experiences; (7) interventions to enhance learning; (8) adaptions of training packages; (9) practica; and (10) formal and informal evaluations. Each module consists of a rationale and synopsis, goals, objectives, outline of training activities, worksheets, reference sheets, and visual aids. Also included is a glossary of training terms, pretests, and posttests. (KMF)

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U.S. DEPARTMENT OF HEALTH
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PUBLIC HEALTH SERVICE
ALCOHOL, DRUG ABUSE,
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TRAINER MANUAL

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CG 015390

TRAINING
OF TRAINERS

COURSE DESCRIPTION

PURPOSE

Training of Trainers describes the content and activities that constitute training delivery; identifies and describes the behaviors and skills associated with training delivery as a task area; identifies and elaborates on the major considerations of training program design and modification; and provides opportunities for participants to develop and refine those skills required for effective training delivery.

AUDIENCE

The primary focus of the course is toward those individuals who deliver or will deliver courses developed within the National Training System (NTS) of the National Institute on Drug Abuse (NIDA). Those skills presented and developed in the course have broad applicability in the general field of training. Therefore, anyone wishing to up-date their skills and knowledge of delivery techniques for training programs can benefit from taking this course.

PREREQUISITES

The design of Training of Trainers assumes that each participant will have successfully completed the following NTS courses or their equivalents:

- Drugs in Perspective, NTS, 1979
- Group Facilitator Training Package, NTS, 1979.

TRAINING STAFF QUALIFICATIONS

The team that delivers Training of Trainers should, in addition to meeting the prerequisites required for participants, be certified as trainers according to the current NTS criteria; this assumes the trainers have an understanding of how people learn and the ability to work as part of a team, when necessary.

REQUIRED MATERIALS

- Trainer Manual

  The Trainer Manual is to be used by the trainer(s) in conjunction with the Participant Manual. The manual includes a sequence of topical areas and exercises, instructions for conducting the various activities, and the approximate time and materials required for each activity.

(CONTINUED ON INSIDE BACK COVER)

TRAINER MANUAL

TRAINING OF TRAINERS

**NATIONAL DRUG ABUSE CENTER
FOR TRAINING
AND RESOURCE DEVELOPMENT**

National Institute on Drug Abuse
Division of Resource Development
Manpower and Training Branch
5600 Fishers Lane
Rockville, Maryland 20857

**NATIONAL INSTITUTE
ON DRUG ABUSE**

**U.S. DEPARTMENT OF HEALTH
AND HUMAN SERVICES**

PUBLIC HEALTH SERVICE

*ALCOHOL, DRUG ABUSE,
AND MENTAL HEALTH ADMINISTRATION*

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INTRODUCTION

In 1974, the first version of the course Training of Trainers was produced by the National Drug Abuse Center for Training and Resource Development (NDACTRD) to provide a means for trainers in the drug abuse field to develop skills in training program delivery. The emphasis of that course was on teaching principles and management of the dynamic processes associated with learning in groups.

In 1975, under the sponsorship of the Manpower and Training Branch of the National Institute on Drug Abuse (NIDA), the course was revised so that emphasis was placed on the principles of adult learning and on a major theoretical development of the group process as supports for learning and skill development. More consideration was given to areas related to the design of new training programs and to the modification of existing ones.

This version of Training of Trainers reflects the results of the recommendations of selected elements of the National Training System (such as Single State Agencies, State Training Support Programs, and Regional Support Centers) in response to a 1979 NDACTRD survey. Recommendations from the Materials Development Advisory Group (MDAG) were also taken into account. Another source of input for this revision was the outcome of a review of the pertinent literature in the field of training and adult education.

MODULE I

MODULE I: INTRODUCTION TO THE COURSE AND TO ADULT LEARNING THEORY

RATIONALE

To learn, adults must understand the relevance to the personal and professional lives of what will be presented. To be comfortable in a learning environment, adults need to know the ground rules, the physical setup, and the schedule. Module I contains information designed to meet those needs. In the initial sections of the module, the trainer will give whatever information is needed about training, setting logistics, and schedule. He or she will then provide a fairly detailed presentation--or overview--of the organization and content of Training of Trainers (TOT) so that participants will have realistic expectations as to what they will learn and practice.

The major didactic content of this module centers on learning theory as it applies to adults. It is important for trainers to realize that they themselves cannot motivate people to learn: motivation comes from within individuals, not from outside people or forces. Trainers can, however, through an understanding of the factors that motivate adults to learn, arrange circumstances so as to increase the likelihood that participants will not lose their motivation to learn in their training programs.

SYNOPSIS

This session opens with participant registration and pretesting. (The Pretest and Posttest section appears at the back of the Trainer Manual.) A brief overview of module objectives, content, and activities is then given. An icebreaker activity is facilitated by the trainer to enable participants to begin to get to know one another. The trainer also takes care of "business," discussing the facility, scheduling, ground rules, and other logistical issues of which participants should be aware. Expectations for the course are discussed, and then approximately 30 minutes are spent in giving a course overview.

The remainder of the module is concerned with adult learning theory. An experiential exercise is the first content-related activity of the course. This exercise is used to get participants in touch with their own experiences as learners. A brief presentation follows on learning theory as applied to adults. Participants then engage in a brief self-diagnosis, applying adult learning theory to their own behaviors as trainers.

The module closes with a brief summary that covers two extremely important aspects of the training: the extent to which objectives were met by module content and activities, and the extent to which participants find the module to be a model training event.

MODULE I: INTRODUCTION TO THE COURSE AND TO ADULT LEARNING THEORY **TIME:** 4 HOURS

GOALS

- To enable participants to begin to get to know each other
- To help participants see how this course will meet their needs in becoming more effective trainers
- To enable participants to see the link between adult learning theory and the design of the content, organization, and methodology of this course
- To lay the groundwork for the application of concepts related to learning theory and adult learning to the delivery and facilitation of training.

OBJECTIVES

At the end of this module, participants will be able to:

- Identify other participants by name
- Name the four basic variables in the adult learning process
- Discuss principles of adult learning in terms of how they learn best
- Diagnose those aspects of their own trainer style that enhance or detract from adult learning
- Name three domains of learning
- List at least three principles from any combination of learning theory orientation
- Describe at least four assumptions about adult learners
- Describe or give an example of the relationship between the kinds of learning activities participants will experience and the retention of learnings.

MATERIALS

- Flip chart or newsprint
- Easel/tape
- Felt-tip markers
- Overhead projector and transparencies (optional)
- Participant Manual
- Photocopies of the Pretest
- Registration sheet
- Participant list
- Name tags (optional)

MODULE I: INTRODUCTION TO THE COURSE AND TO ADULT LEARNING THEORY

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
30 MINUTES	1. REGISTRATION AND WELCOME
	• Greet participants as they arrive.
Registration Sheet	• Ask each participant to sign a registration sheet.
Participant List	• Check names off of your list of participants.
Name Tags (Optional)	• Ask each participant to fill out and wear a name tag (optional).
	• After all participants are present in the large group, briefly welcome participants.
30 MINUTES	2. ADMINISTERING THE PRETEST
	NOTE: All materials for the Pretest and Posttest of this course are contained in the back of the Trainer Manual only. You will need to have adequate numbers of photocopies of the Pretest, Posttest, and Posttest Answer Sheet made in advance of delivering Module I and Module X.
	• Explain why the course has a Pretest and Posttest.
Photocopies of Pretest	• Pass out photocopies of the Pretest.
	• Read the Pretest instructions and answer any questions.
	• Ask participants to individually take the Pretest and return it to you. Remind them to write their names on the top of the test before turning it in.
	• Hand out Participant Manuals.
10 MINUTES	3. MODULE OBJECTIVES
	• Open each module of the course with a discussion of the goals and objectives of the module and a brief description of what participants will be called upon to do to gain the knowledge or skills that meet the objectives.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	• Provide a rationale for the content or exercises in the module; the rationale may be found in the front matter of each module of the Trainer Manual. • Refer participants to the list of module goals and objectives in their Participant Manuals and ask participants to examine them closely. (The goals and objectives for each module appear on the first page of that module in the Participant Manual.) • Entertain participant questions about module contents, rationale, or activities. NOTE: As you initiate the training session, you must stay alert and responsive to the group's entry process. Foremost among the possibilities that may occur are: - Initial discomfort or anxiety attendant upon being in a new situation with unfamiliar people. - Lack of familiarity with the setting, the ground rules, etc. - Expectations that may or may not be met. You may also encounter initial skepticism, reserve, or hostility that is related to previous learning experiences. To counter all of these difficulties, it is important that you facilitate a constructive means of helping participants "break the ice" and begin to get comfortable in the training setting. The Entry Process • Be alert for special problems that have to be dealt with • Encourage people to talk about feelings that may keep them from committing themselves to learning • Listen carefully

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES

- Take feelings seriously
- Show understanding
- Discuss what can be done about any problems
- Point out those problems that the trainer and the group can do something about (maybe some of them can be built into the training program), and the ones that must be handled outside of training.

NOTE: It is during the initial stages of the group that a learning contract is formed. It is necessary to make clear to the group what the trainer is prepared to offer in time, information, and skills to determine whether this meets participants' expectations.

To begin to get these issues of comfort, familiarity, and expectations out in the open, an icebreaker activity is suggested in the next section of this module.

It is appropriate to discuss the actual training schedule later in conjunction with the overview of each module of the course before getting into logistical issues such as:

- Where meetings will be held on subsequent days,
- Location of rest rooms, meals, transportation, and
- Beginning, ending, and break times;

and ground rules such as that:

- Training sessions will begin on time
- Participants will learn from and share with each other
- Different points of view can be explored non-judgmentally

- Questions about things that are unclear are welcome.

40 MINUTES

4. EXERCISE: ICEBREAKER

Participants' Introduction

It is customary to begin most training with an exercise that helps participants begin to get to know each other in order to start the process of group cohesion, discussion of expectations, and contracting to meet learning goals and expectations. To this end, an "icebreaker" exercise is usually the first activity of any course. Use one of the two icebreakers given below. Or, you may choose any icebreaker activity with which you are faimilar.

Icebreaker 1: Name Game

- Explain that each person will state his or her first name and one descriptive comment about himself or herself. The next person will repeat the previous person's name and comments before adding his or her own. After six people have spoken, the seventh person will begin a new round until all trainees have had an opportunity to speak.
- Lead off by giving your name and an adjective.
- The following is an example of this exercise:

Trainer A: Pat, hungry

Trainee 1: Pat, hungry; Alice, tired

Trainee 2: Pat, hungry; Alice, tired; Bill, toothache

Trainee 3: Etc.

Trainee 4: Etc.

Trainee 5: Etc.

Trainee 6: Etc.

Trainee 7: Joe, forgetful

Trainee 8: Joe, forgetful; Jerry, nervous

Trainee 9: Etc.

Icebreaker 2

- Introduce yourself in accordance with the outline below.
    - State your name, particularly what you wish to be called by other participants, as in: "I'm James Evan Alexander, Jr., but please call me Jimmy."
    - State what training you have attended or conducted.
    - Complete the sentence, "As a trainer, I am ______," or "I want to be ______."
- Ask each participant in turn to do the same.

Discussion

- Upon completion of the icebreaker activity, involve group members in either:
    - A discussion of the purpose of icebreakers, or
    - Sharing of favorite icebreaker activities from participants' own experiences.
- Involve participants in a brief discussion of their expectations of the course as a part of the introduction of participants to each other and to the training event.

Flip Chart/Easel
Newsprint
Felt-tip Markers

- Record on newsprint what each participant, in turn, states he or she expects from the training event.
- Let participants know that many of the expectations listed will be covered in the overview of the course (which is the next activity).

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES

30 MINUTES

5. OVERVIEW OF THE COURSE

In this overview, you will:

- Present the four basic variables on which adult learning theory is based.
- Describe each module of the course.
- Describe the interrelationship between modules and the four variables as described in the outline below.
- Let participants know that as you discuss adult learning theory, course modules and organization will also be covered so that the participants will have a very definite idea of how the course is organized, the major content areas, and some of the specific content and activities.

In giving the overview, do the following:

- Begin the overview with a discussion of four basic variables that have an impact on the adult learning process:
    - Learner
    - Trainer
    - Environment
    - Methodology

Visual I-1 (With Overlays)

- Describe each variable briefly, using Visual I-1 and its overlays. State that although each variable may sound simple, it is actually quite complex. For example:
    - The learner is an adult, so special attention should be given to the ways adults learn. (Use the Visual I-1, Base, at the end of this module.)
    - The learner may also be a member of a particular ethnic group or minority group which may further affect how he or she learns.
    - The trainer may be one, two, or even three persons. Trainers' individual styles and the combination of their styles and

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	expertise greatly affect the learning situation. (Use Visual I-1, Overlay 1.) - The environment has many aspects--the physical space, the emotional climate, and the group's characteristics. (Use Visual I-1, Overlay 2.) - Methods are multitudinous; some more and some less appropriate to adult learners (Visual I-1, Overlay 3.)
Visual I-2	• Display Visual I-2, which shows the building blocks that make up this course.
Flip Chart/Easel Newsprint Felt-tip Markers	NOTE: If this course has been adapted for a particular group or schedule, you will need to make flip charts that reflect this reorganization, rather than using the prepared visuals.
	• Relate each of the four variables of the adult learning process to the appropriate "blocks" shown in Visual I-2. Visual I-2 helps the trainer get across the large units of the subject matter--the modules of the course. It would be helpful to let participants know the overall goals of each module as the trainer describes the content. (You can get across the specific objectives of each module with the introduction of each module in proper sequence.) For example, state the following: "Although information about the trainer is woven into the course throughout, it is largely concentrated in Modules II, V, VI, VII, and X. In Module II, trainer style--its effect on the group and on individual learners--is examined. In Modules VI, VII, and X, various aspects of facilitation skills are attended to, while Module V concentrates on many aspects of trainer delivery skills. The environment is, in major part, dealt with in Module II. The small group, also discussed in Module II, becomes the major environmental factor. The physical environment and the

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	trainer's responsibility for it is touched on in Module V when preparation for course delivery is discussed. Learner/trainee considerations are covered in Modules I, IV, and VIII. Methodology is covered mainly in Modules I and V. The subject matter of the course does not easily break into discrete parts. The division here represents the most logical organization. The material in different modules is interdependent, and it is not always possible to integrate each section with all the other modules which pertain to it. This is particularly true of the first four modules which are basic to Modules V through X." • At this point, it may be helpful to go back to expectations of the course to firm up the fit between participant expectations and course content goals--that is, the learning contract. • This is also an excellent time to go over the schedule for the entire training program. • Questions or comments may be entertained. • This is also a good time to take a break.
5-10 MINUTES	BREAK
30 MINUTES Flip Chart/Easel Newsprint Felt-tip Markers	6. EXERCISE 1-1: PARTICIPANTS' ASSESSMENT OF LEARNING NEEDS Use either of the following two exercises to serve as a warm-up for the information to follow about adult learning theory. Exercise I-1, Option A: Guided Fantasy--"Closed-Eye" Recall • Refer participants to instructions in their manuals for this exercise. When they are ready, give the following instructions:

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	- Close your eyes. - I (the trainer) will walk around the room and give you instructions as we go--you may hear my voice from different places in the room. - Take a few deep breaths. Relax. . .Follow my instructions. - Think of an experience where you were learning to do something. It can be recent, it can be related to your job, or it can be related to learning some new skill. - Your mind is probably flashing through many events. Try to settle on one. Don't worry about which one it is. Choose one experience and stay with it. Try to get a clear picture of what you are doing. - Where are you? - What is happening? Is someone instructing or are you on your own? What are you doing? Are you moving around or in one place? What is the expression on your face? What is the feeling in your body? What are your hands doing? - How are you feeling? Competitive? Excited? Tense? Relaxed? Have you felt this way before? Which of those feelings add to the learning experience? Which detract? - Did the experience make you feel good about yourself, your abilities, your skills? - Did it challenge you to use what you already know? - Will it be useful to you in your work? - Keep focused on the experience. Notice any other things that are important about it. When you feel you have a full picture, open your eyes.

  - Did you find or recognize patterns about how you learn best?
  - What kinds of learning came to mind?
  - Which aspects of the situation you recalled enhanced your learning? Which detracted from it?

- The exercise should be processed. You might list participant responses to the Guided Fantasy items on newsprint.

Exercise I-1, Option B: Structured Experience--How Do You Learn Best?

- If the trainee group needs a more structured exercise, "How Do You Learn Best?" may be substituted for Exercise I-1, Option A. Refer participants to the Participant Manual for instructions for this exercise.
- When participants are ready:
  - Facilitate formation of small groups of 4 and arrange a separate area for each.
  - (15 MINUTES) Instruct group members to think of and discuss the ways they feel they learn best and list each on newsprint.
  - (10 MINUTES) Instruct each group to choose a spokesperson who posts the newsprint and reports the findings.
  - Identify the similarities and differences in participants' learning needs.
- If this option is used, it should be processed in the same way as the Guided Fantasy (Exercise I-1, Option A).

20 MINUTES — 7. LECTURE: ADULT LEARNERS AND LEARNING THEORY

- Develop a presentation on:

  - Characteristics of adult learners.
  - Aspects of learning theory.

- Decide how the presentation will be delivered; e.g., as a:
  - Straight lecture
  - Lecture and discussion
  - Exercises.

- Use the visuals accompanying this module either to elucidate lecture material or to stimulate discussion.

- Be sure to cover the following specific topics:

  a. Learning Principles

Visual I-3

  - Use Visual I-3 to organize a discussion of the principles in relation to the four elements of adult learning.
  - If the audience is appreciative of heavy cognitive content, you may go on to a discussion of Hilgard's grouping of learning principles (see Selected Reading I-1 in the Participant Manual), making the following points:

    Ernest R. Hilgard opposed the fragmentation of learning theory into different families of theories. He identified principles from stimulus-response theory, cognitive theory, and motivation and personality theory that are useful principles to take into account when constructing training for adults.

  - Review each of the principles listed in the Participant Manual in relation to its parent theory.

NOTE: The more significant learning principles might be written on newsprint, hung on the walls, and referred back to during later modules of the course.

b. Domains of Learning

Selected Reading I-2

- Refer to the Three Domains of Learning (see Selected Reading I-2). Ask how many participants are familiar with this concept.
- Discuss the meaning of the cognitive (thinking), affective (attitudes, values, and interests), and psychomotor (skill-building) domains.

NOTE: In this course we are using the term "psychomotor domain" in a broader sense than usual--as skill-building behavior, rather than performing physical acts.

- Give as an example the different domains used in counseling activities.
- Explain that improving job performance usually requires participant learning in at least two of the three domains.
- Even learning to fill out a new form implies:
    - Cognitive--knowing why it should be filled out so that people will do it after they've been taught how; understanding how to fill out the form;
    - Affective--influencing people to believe it is important to fill out the form;
    - Skill-building--practice in filling it out.

NOTE: There are various training methods (strategies) that can be used to influence learning in each of the three domains. We will develop these training strategies in Module V.

All of this is closely related to choice of training method and will become even more relevant in Module

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	V. You can point out the connection between learning domain and choice of method or media:
Visuals I-3, I-4, and I-5	- Use Visuals I-3, I-4, and I-5 to make these points.
	- Point out the advantages of active involvement by participants and its importance for this and other courses.
Reference Sheet I-1	- Use Reference Sheet I-1, Dale's Cone of Experience, to present this concept.
Reference Sheet I-1	• Discuss the Cone in terms of what "People Generally Remember" and the "Levels of Abstraction." (See Reference Sheet I-1 at the end of this module in this manual and in the Participant Manual.)
	• State the following: These are, however, general principles. Individuals vary greatly in the ways they learn best. Some people are visually oriented; they learn best through activities that emphasize reading and seeing slides, movies, and demonstrations; other people are more influenced in their learning by what they hear rather than what they see, and still others learn best by doing.
Selected Readings I-3 and I-4 Reference Sheets I-2, I-3, and I-4	The learning theory of the presentation can be taken from Selected Readings I-3 and I-4 in the Participant Manual, and from any other sources known to the trainer. The "Summary of Characteristics of Adult Learners" and "TOT Training Assumptions" are in Reference Sheets I-2 and I-3 in the Participant Manual. Reference Sheet I-4 in the Participant Manual comprises a bibliography of materials about learning theory.
Flip Chart/Easel Newsprint Felt-tip Markers	DISCUSSION: OPTION A • Write some of the characteristics of adult learners on a flip chart and have participants relate the positives and negatives of the "closed-eye recall" exercise (Exercise I-1, Option A) to the items on the list.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	DISCUSSION: OPTION B • Have the group brainstorm a list of things that turn adult learners off, such as: - The expert trainer who always knows the right answer - Concern for intellectual things is inappropriate - It is shameful not to know the right answer - It is bad to admit ignorance.
5-10 MINUTES	BREAK
30 MINUTES Worksheet I-1 (Self-Diagnostic Worksheet and Option A)	8. DISCUSSION: SELF DIAGNOSIS Self-Diagnostic Worksheet The information that has been presented above on learning theory and adult learners can only be valuable to participants if they too are actively involved with the content. This can be accomplished by having participants look at themselves and their behavior in relationship to it. Another way to say this is that participants must process the knowledge. The following exercise will aid this integration process. Exercise I-2, Option A • Direct participants to Worksheet I-1, "Self-Diagnostic Worksheet" in their Participant Manuals (also included in the Trainer Manual at the end of this module). They will be concerned with the "Self-Diagnostic Worksheet" and with Worksheet I-1 (Continued), Exercise I-2, Option A: Closed Eye Recall. Introduce this exercise as a brief self-assessment of each participant's own characteristics as a trainer of adult learners. • Preview the fact that participants will be more significantly involved in assessment of themselves as trainers during Module III--trainer

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*

style--on the following day. In this exercise, however, they are looking at themselves solely in terms of how they related to adults' learning needs.

- Direct participants to begin.
- After 10 minutes, help participants break up into small groups of approximately five to discuss their thoughts about:
  - Their own needs as learners in general and their needs in relation to this course.
  - Their ability to relate to the needs of adult learners.
- After 20 minutes have elapsed, reconvene the large group and request any general questions or comments.

Worksheet I-1 (Self-Diagnostic Worksheet and Option B)

Exercise I-2, Option B

- If the trainer feels that some members of a participant group will not be able to identify the ways that they relate to other adults' learning needs, or that participants are not yet ready for an exercise requiring self-disclosure, the exercise may be modified as follows. Instruct participants to fill out Worksheet I-1 on the basis of their recalled experience. That is, they are to write whatever fulfilled their self-concept needs, or violated it, in the appropriate boxes; whether their accumulated experience was respected and built on or ignored; and so on for each of the boxes.
- Suggest that participants fill out the worksheet with respect to how they relate to adult learners at some point after they take part as trainer in a training event.
- Direct them to read Worksheet I-1 (Continued), Exercise I-2, Option B, Structured Experience: How Do You Learn Best?
- Direct participants to begin.

- After 10 minutes, help participants break up into small groups of approximately five to discuss their thoughts about:
  - Their own needs as learners in general and their needs in relation to this course.
  - Their ability to relate to the needs of adult learners.
- Remind participants that the foundation for this discussion is the "closed-eye recall" exercise (Exercise I-1, Option A) and the individual assessment just completed.
- After 20 minutes have elapsed, reconvene the large group and request any general questions or comments.

---

10 MINUTES

9. MODULE OUTCOMES

The last segment of each module has as its purpose:

1. Pulling together what was taught
2. Determining the extent to which module objectives were met
3. Generalizing (from the material, methods, media, trainer behavior, and any other aspect of the course) what is of value as a model for participants.

- The trainer may do the summaries required in 1) above or elicit the information from participants. It might be fruitful to have participants re-examine the list of goals and objectives (listed in their manuals) in order to comment on whether or not they were met. It obviously is important to involve participants in discussion of items 2) and 3) above.

NOTE: Since this is still very early in the training event, participants may have difficulty evaluating materials, methods, and, especially, the trainers. While you want to encourage the kind of personal evaluation outlined here so that participants are better able to learn and use TOT experiences, participants should not be pushed into making statements if they are not ready to do so.

With this caution in mind, the following questions may serve as a guide for determining the extent to which the course modules model useful information, techniques, and behavior for participants:

- Would you have felt comfortable doing this module?
    - Using the icebreaker?
    - Processing each other's expectations of the course?
    - Lecturing or presenting as was done here?
    - Using the overhead projector and/or flip charts?
- How does using an overview fit in with adult learning theory?
- Is the trainer's or trainers' model behavior congruent with adult learning theory?

END OF MODULE I

WORKSHEET I-1
SELF-DIAGNOSTIC WORKSHEET
(FOR USE IN EXERCISE I-2)

CHARACTERISTICS OF ADULT LEARNERS	THINGS THAT FULFILL THESE CHARACTERISTICS	THINGS THAT VIOLATE THESE CHARACTERISTICS
1. Self-concept		
2. Accumulated Experience		
3. Readiness to Learn		
4. Immediacy of Application		

This worksheet was supplied by the National Center for Alcohol Education, which took it from the monograph, "The Leader Looks at the Learning Climate," by Malcolm Knowles. Published and copyrighted by Leadership Resources, Inc., Falls Church, Va. It is reproduced here by special written permission of the publisher.

EXERCISE I-2, OPTION A
CLOSED EYE RECALL

PURPOSE:

To explore for oneself the kinds of things that go into a learning experience

MATERIALS:

None

PROCEDURE:

1. Close your eyes and listen to trainer instructions.
2. After the trainer has told you to open your eyes, write your thoughts about what was positive and what was negative in the learning experience.
3. Verbally share as much or as little as you wish of your experience with the large group.

TIME:

30 minutes

EXERCISE I-2, OPTION B
STRUCTURED EXPERIENCE: HOW DO YOU LEARN BEST?

PURPOSE:

To explore the similarities and differences in how people learn

To share these similarities and differences within the training

MATERIALS:

Newsprint or flip chart
Felt-tip markers
Masking tape

PROCEDURE:

1. Form small groups of four persons each, seated in different areas of a large room or located in separate small-group rooms.

2. Think about the ways you learn best. In your small groups, discuss these ways for the next 15 minutes and list them on newsprint.

3. Select someone to be the spokesperson for the small group to report findings.

4. Post each small group's newsprint on the walls of the room.

5. Spokespersons report for their groups (10 minutes).

6. As a group, summarize the structured experience by noting similarities and differences in learning needs that trainers need to consider when designing and delivering training (5 minutes).

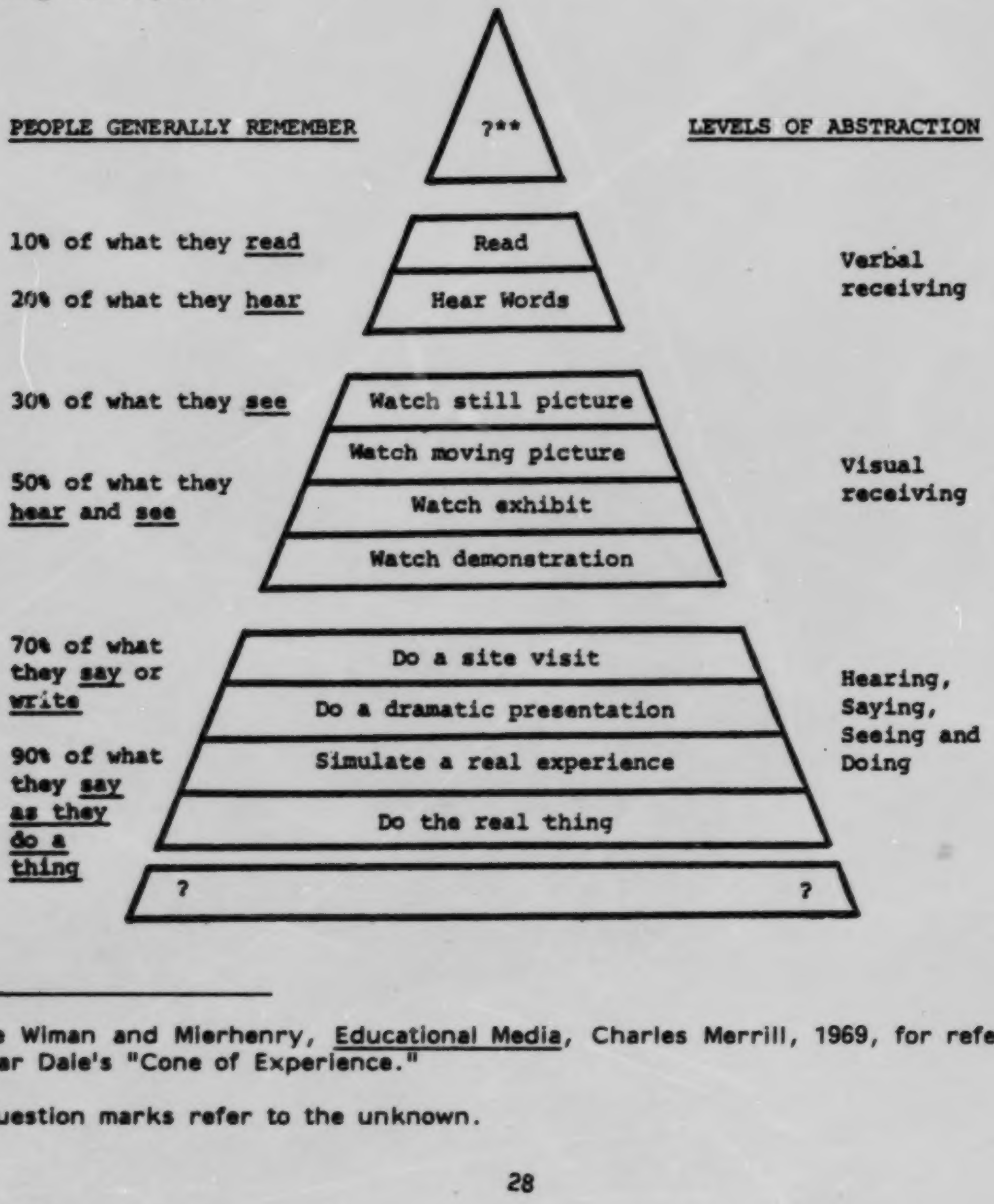
TIME:

30 minutes

REFERENCE SHEET I-1
DALE'S CONE OF EXPERIENCE

APPLICATION OF A BASIC LEARNING PRINCIPLE

An important learning principle that is supported by extensive research is that persons learn best when they are actively involved in the learning process. Dale's Learning Cone of Experience shown below shows various learning activities grouped by levels of abstraction. The left column indicates their relative effectiveness as training techniques.



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*See Wiman and Mierhenry, Educational Media, Charles Merrill, 1969, for reference to Edgar Dale's "Cone of Experience."

**Question marks refer to the unknown.

Reference Sheet I-1, Continued

These are, however, general principles. Individuals vary greatly in the ways in which they learn best. Some people are visually oriented: they learn best through activities that emphasize reading and seeing slides, movies, and demonstrations. Other people are more influenced in their learning by what they hear rather than what they see, and still others learn best by doing.

REFERENCE SHEET I-2
A SUMMARY OF CHARACTERISTICS OF ADULT LEARNERS

- Adults are at various stages of autonomy, and they exercise their autonomy in learning situations. Their concepts about themselves directly affect their behavior and desire to learn.
- Adults have a broad base of experience upon which to draw and to share with others.
- Adults seek to learn what they have identified as important rather than what others deem important.
- Adults look to learning what can immediately be applied.
- Adults are problem-centered rather than subject-centered.
- Adults want to know if what they are asked to learn is relevant to their needs.

REFERENCE SHEET I-3
TOT TRAINING ASSUMPTIONS*

The training process followed in TOT is based upon certain assumptions; the most important of these are the following:

1. Learning may be defined as a change in behavior.
2. Participants bring with them a cluster of understandings, skills, appreciations, attitudes, and feelings that have personal meaning to them and that are in effect the sum of their reactions to previous experiences.
3. Participants have developed self-concepts that directly affect their behavior.
4. Learning requires activity on the part of the participants; they cannot be passive.
5. Ultimately, participants learn what they want to learn; they do not learn what they do not accept (or come to accept) as meaningful and useful.
6. Learning is enhanced when participants accept responsibility for their own learning.
7. Learning is directly influenced by the physical and social environment.
8. Learning is enhanced when the learning situation provides an opportunity to apply new information in as realistic a situation as is feasible.
9. Participants are more highly motivated when they understand and accept the purposes of the learning situation than when they do not.
10. Participants are motivated by experiences of success.
11. Participants tend to be motivated if they feel accepted by the trainer.
12. Participants are motivated when they can associate new knowledge with previous knowledge.
13. Participants are motivated when they can see the usefulness of the learning in their own personal terms.

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*Based on a list in Teachers and Learners by Alfred Gorman, 1974.

REFERENCE SHEET I-4
LEARNING THEORY BIBLIOGRAPHY

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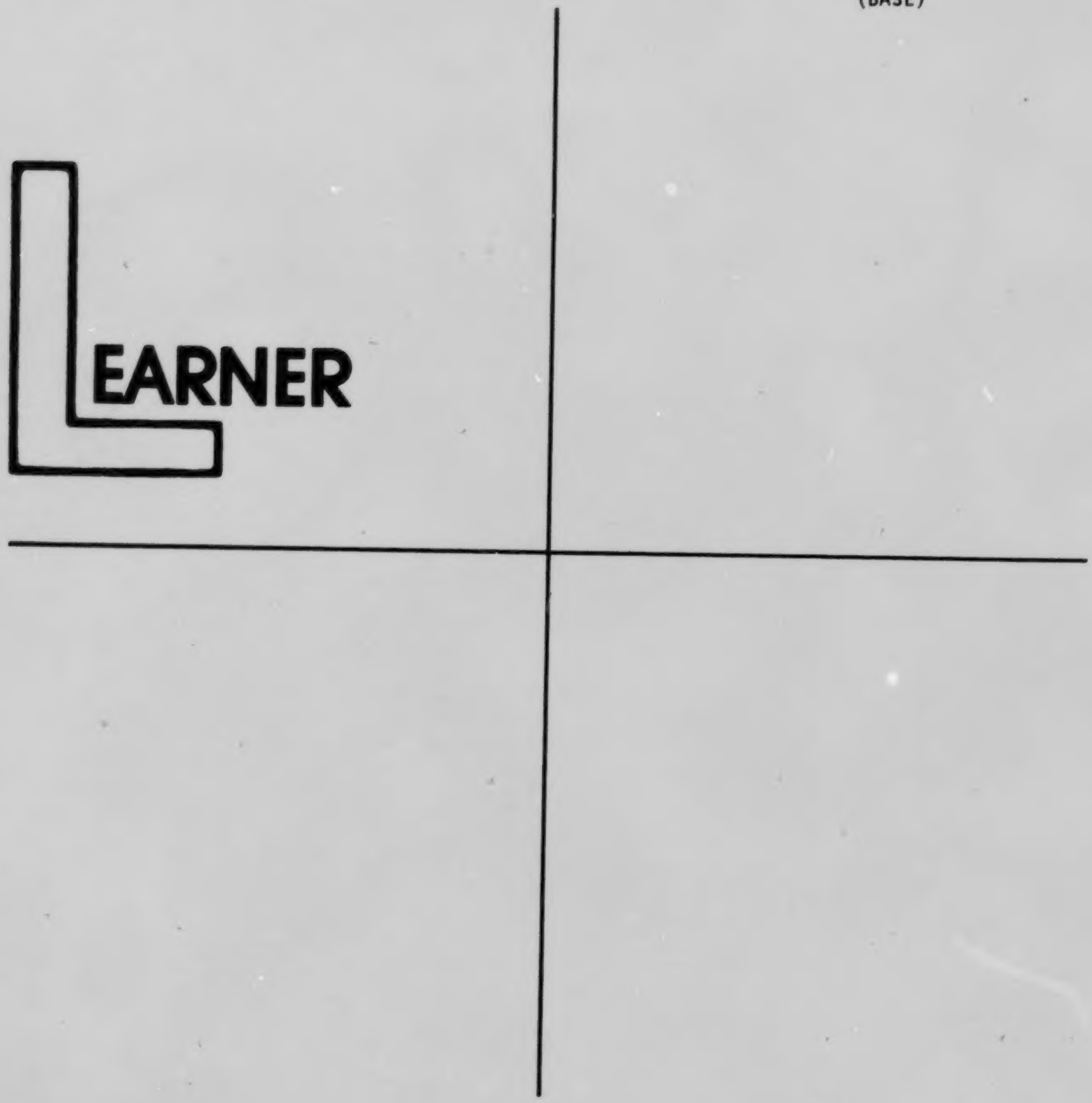
VISUAL I-1
(BASE)



VISUAL I-1
(OVERLAY 1)

TRAINER

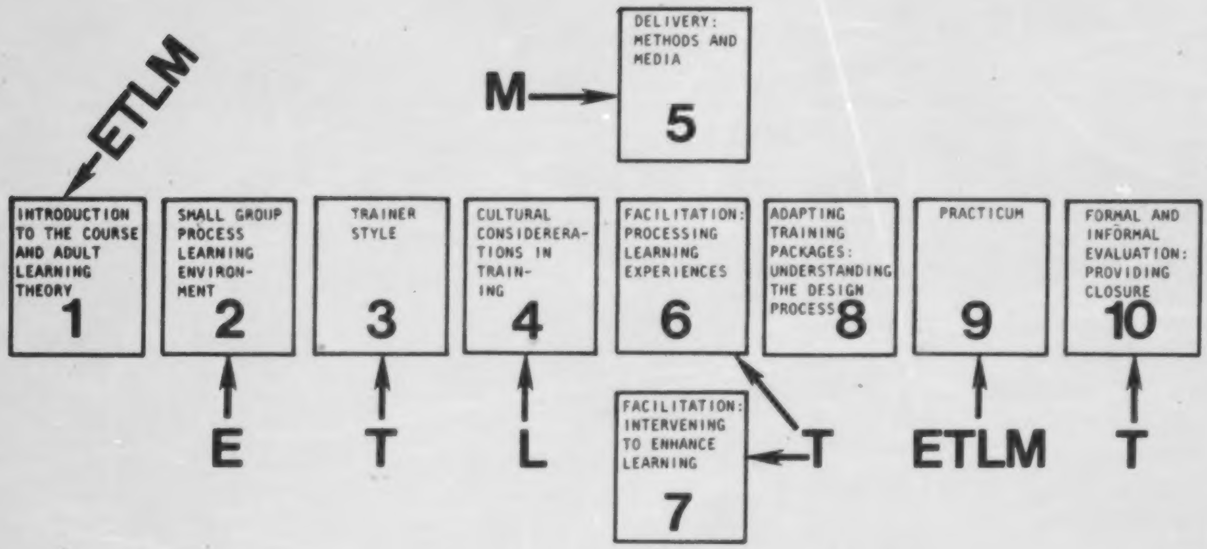
VISUAL I-1
(OVERLAY 2)

ENVIRONMENT

VISUAL I-1
(OVERLAY 3)

METHOD

VISUAL 1-2


ETLM
INTRODUCTION TO THE COURSE AND ADULT LEARNING THEORY 1
SMALL GROUP PROCESS LEARNING ENVIRON-MENT 2
E
TRAINER STYLE 3
T
CULTURAL CONSIDERERA-TIONS IN TRAIN-ING 4
L
M
DELIVERY: METHODS AND MEDIA 5
FACILITATION: PROCESSING LEARNING EXPERIENCES 6
T
FACILITATION: INTERVENING TO ENHANCE LEARNING 7
ADAPTING TRAINING PACKAGES: UNDERSTANDING THE DESIGN PROCESS 8
PRACTICUM 9
ETLM
FORMAL AND INFORMAL EVALUATION: PROVIDING CLOSURE 10
T

VISUAL I-3

LEARNERS

- Motivation
- Readiness to learn
- Ability to learn
- Individuality and autonomy
- Experience of the group

TRAINER

- Adaptable style
- Agreed upon role
- Knowledge of topic
- Leadership
- Facilitation skill

ENVIRONMENT

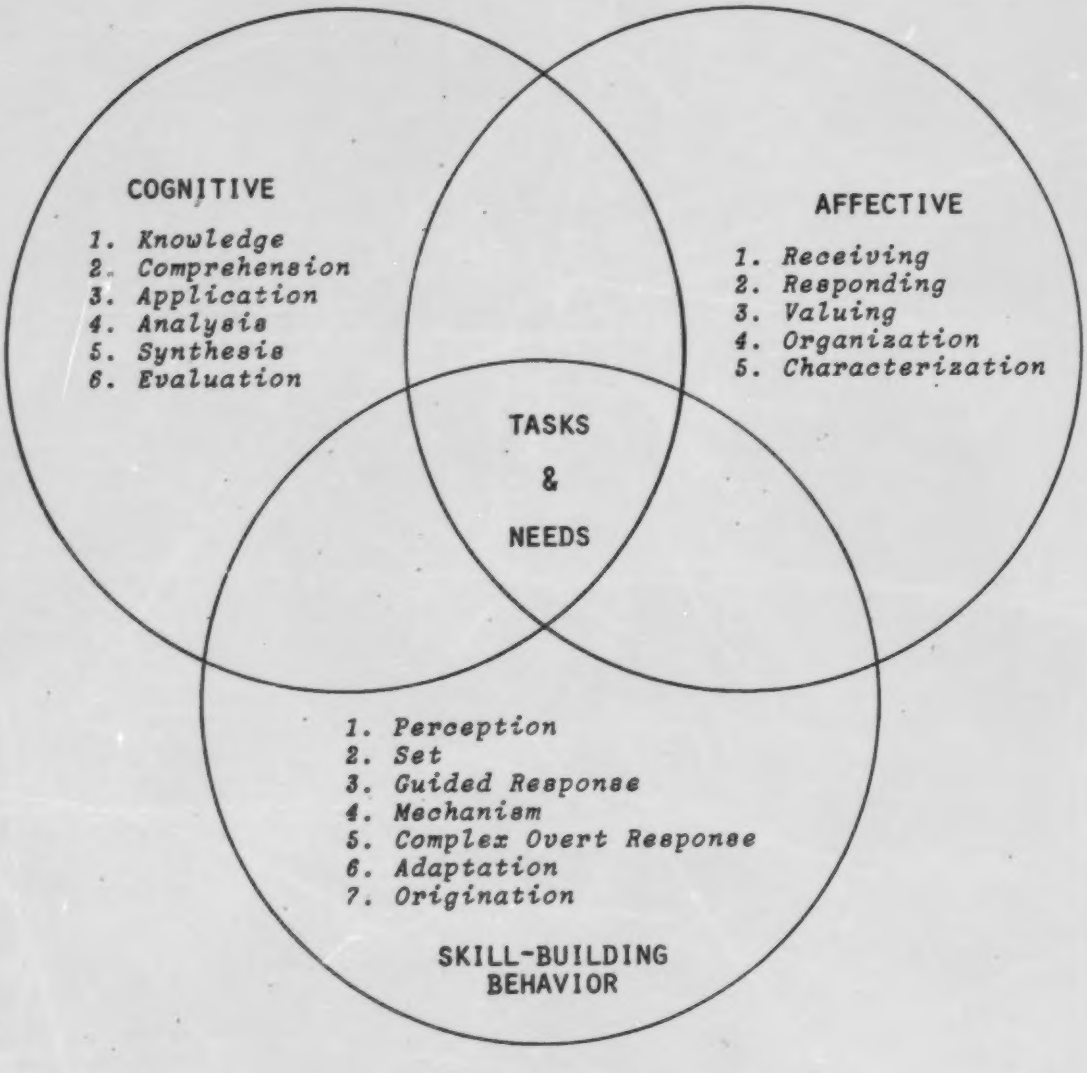
- Psychological appropriateness
- Physically conducive to learning
- Size of group
- Composition of group

METHODOLOGY

- Self-directed activities
- Experience-based activities
- Problem-centered activities
- Learnings which are able to be immediately applied
- Practical application of skills back on the job

VISUAL I-4

THE THREE DOMAINS OF LEARNING*



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*These categories of Cognitive and Affective Domains were adapted from Bloom's taxonomy in Bloom, Benjamin S., Hastings, J. Thomas, & Madans, George F. Handbook on Formative and Summative Evaluation of Student Learning. New York: McGraw-Hill, 1971. The categories for the Psychomotor Domain were adapted by Elizabeth J. Simpson of the U.S. Office of Education in The Classification of Educational Objectives in The Psychomotor Domain. Washington, D. C.: Gryphon House, 1972.

VISUAL 1-5

TYPES OF LEARNING AND METHODS TO FIT

Types of Learning	Appropriate Methods (Strategies)	
I. COGNITIVE (THINKING) -- Recalling and using information appropriately.	. Reading . Lecture, panels . Audiovisual presentations . CAI (Computer Assisted Instruction)	. Book-based discussions . Case problems . Essays, exams
II. AFFECTIVE (ATTITUDES, VALUES, INTERESTS) --Showing a preference for selected concepts; exhibiting feelings.	. Field trips . Reverse role-playing . Open-ended discussion . Counseling	. Consciousness-raising groups . Meditation, reflection . Creative Arts, Performing Arts
III. PSYCHOMOTOR (DOING) -- Performing physical acts.	. Drill . Behavior modification . Simulation games . Demonstration and practice . Internship	

MODULE II: SMALL GROUP PROCESS-- THE LEARNING ENVIRONMENT

RATIONALE

Module II reviews participant understanding of small group theory and processes. Attention is focused on group dynamics at the various stages of group growth, particularly that of the trainer's effect and interaction at each stage. With this focus, participants can begin to formulate for themselves a range of facilitative behaviors that they will want to engage in.

There are different types of groups: those whose process is extremely regulated by goals, tasks, and structure; and those who process is almost totally unstructured, as with therapy or other self-discovery groups.

This course's training activity, and the kinds of training groups that participants will be facilitating, are highly structured in terms of goals and objectives. Those involved in this training will have a reasonably clear idea of the theoretical and skill content to be covered. Many individual and interpersonal interactions will color the atmosphere just because the learning environment is a group situation. While these processes are generally more intense in less structured groups, they can be relatively intense in a training group. Skillful facilitation by the trainer is required to process the learning and members' feelings and reactions, and to intervene sometimes at the individual or group level to complete learning tasks. While the trainer must understand and stay on top of group processes, the purpose of facilitation is to enable learning to occur, not to evaluate individual or group interaction for personality growth, although individual growth will occur as incidental learning.

It should be noted that the information in this module pertains to small groups, generally consisting of less than 21 participants, who often are broken down into 2 or 3 even smaller groups. Beyond 21, there is little opportunity for everyone to interact with one another, and there is a resultant decrease in the intensity of group processes.

SYNOPSIS

After providing a brief overview of the module, the trainer reviews the information about groups and discusses the stages of group gorwth in relation to the kinds of leadership a trainer is called upon to provide. This is followed by a quick look at the development of the participants' own training group. The group then brainstorms a list of process dynamics, elements, or roles which serves as a transition to practice the skill of process observation in a lengthy role play. This is followed by the summary of module outcomes.

MODULE II: SMALL GROUP PROCESS--THE LEARNING ENVIRONMENT

TIME: 2 HOURS 35 MINUTES

GOALS

- To increase knowledge of groups and their processes
- To increase awareness of the leader/trainer role at various stages of a group's life
- To organize a means of observing, analyzing, and interpreting group processes.

OBJECTIVES

At the end of this module, participants will be able to:

- List at least five elements of dynamics through which group process can be observed
- Describe the relationship between group maturity and the kind of leadership generally needed at each stage
- Identify three role functions group members can play
- Define the following terms:
    - Content
    - Process
    - Group
    - Group process
    - Group elements
    - Member elements
- Diagnose the stage of growth of their own group
- List elements and dynamics common to most groups
- Observe and identify elements and dynamics during a simulated group activity.

MATERIALS

- Flip chart or newsprint
- Easel/tape
- Felt-tip markers
- Overhead projector and transparencies (optional)
- Participant Manual

MODULE II: SMALL GROUP PROCESS--THE LEARNING ENVIRONMENT

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
10 MINUTES	1. MODULE OVERVIEW The rationale, objectives, and activities of this module are discussed so that participants have an idea of what they will be learning and what they will be doing. • Refer participants to the list of goals and objectives for Module II in their manuals so that they can be examined in detail. Since the major activity of this module is the first one in which participants break down into small groups and have some intensity of interaction, careful attention should be paid to group atmosphere, particularly participant discomfort. • As part of the module overview, facilitate a discussion of the prerequisite knowledge expected of participants. Such a discussion also serves as a transition to the lecture below, in which the stages of group growth are discussed in terms of their elements and relevant dynamics. The following is a list of expected prerequisite knowledge covered in the NDACTRD Group Facilitator Training Package course:
Reference Sheet II-1	- The concept of a group (Reference Sheet II-1--included in the Trainer and Participant Manuals--might be useful in explaining this point) - Group goals and goal setting - The distinction between process and content - A general sense of roles - Hidden agendas.
20 MINUTES	2. LECTURE: DYNAMICS AND ELEMENTS AT VARIOUS STAGES OF GROUP GROWTH • Develop a lecture/presentation that covers the following topical areas.

MODULE II: SMALL GROUP PROCESS--THE LEARNING ENVIRONMENT

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
	- Brief review of prerequisite knowledge if it has not already been discussed.
Visual II-1 Selected Readings II-1 through II-5	- Frameworks for viewing group growth. Use Visual II-1 at the end of this module and the Selected Readings for Module II in the Participant Manual to develop these points.
	NOTE: Visual II-2 is explained in detail in Selected Reading II-5.
	- Cautions about making generalizations. Ensure that participants realize that:
	a. Not every group "grows" in the same way--some never leave Stage I and some get stuck in other stages;
	b. Not every group shares the same level of process intensity--particularly ethnic/minority audiences that may be less self-disclosing or less experimental or less sharing; and
	c. Combinations of participants and of leaders and participants may experience fast or slow progress.
	- What to observe in a group--elements and dynamics.
Visual II-2	- Trainer role in relation to group growth. (Use Visual II-2 to make this point.)
	● Use the following questions to generate discussion:
	- Is conflict bad?
	- When should the leader encourage group cohesion?
	- When will dependence on the trainer be most appropriate? Inappropriate?
	- When might you expect an open and trusting atmosphere?

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	- What should be occurring in such an atmosphere? Giving and requesting feedback? Sharing ideas and feelings? - When might participants feel most able to try out new behaviors? - What kinds of things do members compete about?
30 MINUTES	3. DISCUSSION/EXERCISE: A LOOK AT THIS TRAINING GROUP It would be useful to have participants take a look at their own group to extrapolate those dynamics relevant to its stage of development, thereby beginning to process the material in the preceding section. Exercise II-1: Group Growth Determination
Worksheet II-1	• Direct participants to the Group Growth Questionnaire and have them fill it out. (See Worksheet II-1 in the Participant Manual.) It should be noted that #1 on the questionnaire scale conforms to early group stages and #5 to later stages of group development.
Flip Chart/Easel Newsprint Felt-tip Markers	• Make a rough composite tally of the results on a flip chart or newsprint. NOTE: All ratings reflect individual values and biases. Cultural differences may also be at play. This is fine. However, care must be taken during the processing of the ratings to have these values and differences owned and made explicit.
	• After participant responses are tallied, have the group examine at which end of the scale they fall, and whether this result was expected given the stage at which the group is. • Then, request discussion of the process elements and dynamics of which various participants are aware.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	• You may request behavioral examples in support of particular ratings. • You may highlight similarities and differences of perception between participants. • Ask participants to contrast a training group such as this one with a counseling situation of some other type of personal growth group.
5-10 MINUTES	BREAK
30 MINUTES Flip Chart/Easel Newsprint Felt-tip Markers	4. DISCUSSION: ELEMENTS AND DYNAMICS OF THE SMALL GROUP • Request participants to brainstorm a list of the possible behaviors that one might see (as preparation for the lengthy exercise focused on observing elements and dynamics). • Appoint recorder; request that participants list elements and dynamics that can be seen in a working group. The following are items that might come up. They may be used to stimulate discussion if overlooked by the group: - Roles (maintenance, task) - Decisionmaking - Conflict - Leadership - Dependency on trainer - Participation - Cooperation - Flight or fight - Patterns of communication - Pairing. The ensuing discussion should be facilitated in such a way that: • All important elements and dynamics are covered. • The dynamics and elements are related insofar as possible to group stage of growth.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	• The elements and dynamics are fully explained, such as the variety and types of roles that group members play.
Reference Sheet II-2	You should also point out the selected bibliography on the small group and its process in Reference Sheet II-2 (reproduced in the Trainer and Participant Manuals).
10-15 MINUTES	BREAK
45 MINUTES	5. EXERCISE: INCREASING SKILL IN OBSERVATION The exercise that participants will now engage in is designed to call upon their knowledge of the dynamics and element of the group process. Exercise II-2: Observation of Group Processes
Worksheet II-2	• Direct participants to Worksheet II-2 in their manuals. • Begin this activity with some comments about the function of observation and, where possible, connect remarks to examples from previous material and exercises and to illustrations from this training group itself. • To show the range of observations possible, you can leave hanging the results of the brainstorm activity that just took place and relate the items to what the group will be observing. • When the group is sufficiently involved, ask for volunteers for a five-member group to role play a problem; the remainder of the participants will make systematic observations. • Select and give the participants the scenario and their roles. • Meet with the role player subgroup and help members to select their chairperson and various roles. (This will require at least 10 minutes.)
Worksheets II-3, II-4 and II-5	• Divide the larger group into three smaller groups led by trainers, while the role players

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*

are being briefed. Each trainer distributes one kind of observation schedule (so that each subgroup will be making a different type of observation (Worksheets II-3, II-4, and II-5) and assists the group to prepare for its tasks, make decisions about consensus, reporting, and so on.

- After briefing as described above, re-assemble the subgroups and arrange them in a fishbowl with the role players around a table in the center.
- Instruct the role players to begin; announce the time intervals to the observing subgroups; and stop the discussion among the role players after 10 minutes.
- Allow 5 minutes for the subgroups to arrive at consensus after the role playing is stopped.
- After the role play, reports are given by each observer subgroup in turn. Full discussion of each report should be encouraged from the other subgroups and the role players. Comparisons should be drawn between the types of observations and their usefulness.
- In processing this exercise, it is important to include the role players as "observers" of their own dynamics. It might be interesting to obtain this self-feedback before each subgroup reports its findings.

Among the possible discussion questions that you might want to raise are:

- Do you see how these kinds of observations could be helpful when you conduct training?
- Which kinds of observations might lead to interventions? Why?

---

10 MINUTES

6. MODULE OUTCOMES

- Engage group in a discussion as to how well objectives were met

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	• Then discuss the module in terms of the extent to which it models appropriate trainer behavior, methods, and techniques. • Before ending, link the content (or "processes discussed") in this module to Modules VI and VII (the trainer facilitation modules). In fact, Module II is the foundation for Modules VI and VII. You might also summarize the group development issues related to cultural differences that appear in this module, and which will be explored further in Module IV.
	END OF MODULE II

WORKSHEET II-1
GROUP GROWTH DETERMINATION
(FOR EXERCISE II-1)

PURPOSE:

To gain a general picture of the perceptions which various group members have about the group and its growth during its initial stage.

MATERIALS:

Group Growth Questionnaire

PROCEDURE:

1. Fill out the Group Growth Questionnaire that appears on the following page.
2. Jot down notes on perceptions you have about the group, if any, beyond what is covered on the questionnaire.

TIME:

5-10 minutes

Worksheet II-1, Continued

THE GROUP GROWTH

As a group begins its life and at several points during its growth, the leader and members might individually fill out the following scales and then spend some time sharing the data that are collected. Through these scales, it is possible to get a general picture of the perceptions which various members have about the group and how it is growing. It is also possible to pick up areas in which there may be some difficulties which are blocking progress.

1. How clear are the group goals?

1.	2.	3.	4.	5.
No apparent goals	Goal confusion, uncertainty, or conflict	Average goal clarity	Goals mostly clear	Goals very clear

2. How much trust and openness in the group?

1.	2.	3.	4.	5.
Distrust, a closed group	Little trust, defensiveness	Average trust and openness	Considerable trust and openness	Remarkable trust and openness

3. How sensitive and perceptive are group members?

1.	2.	3.	4.	5.
No awareness or listening in the group	Most members self-absorbed	Average sensitivity and listening	Better than usual listening	Outstanding sensitivity to others

4. How much attention was paid to process? (The way the group was working?)

1.	2.	3.	4.	5.
No attention to process	Little attention to process	Some concern with group process	A fair balance between content and process	Very concerned with process

Worksheet II-1, Continued

5. How were group leadership needs met?

1.	2.	3.	4.	5.
Not met, drifting	Leadership concentrated in one person	Some leadership sharing	Leadership functions distributed	Leadership needs met creatively and flexibly

6. How were group decisions made?

1.	2.	3.	4.	5.
No decisions could be reached	Made by a few	Majority vote	Attempts at integrating minority vote	Full participation and tested consensus

7. How well were group resources used?

1.	2.	3.	4.	5.
One or two contributed, but deviants silent	Several tried to contribute, but were discouraged	Average use of group resources	Group resources well used and encouraged	Group resources fully and effectively used

8. How much loyalty and sense of belonging to the group?

1.	2.	3.	4.	5.
Members had no group loyalty or sense of belonging	Members not close but some friendly relations	About average sense of belonging	Some warm sense of belonging	Strong sense of belonging among members

9. Other dimensions ______________________________

____

____

WORKSHEET II-2
ELEMENTS AND DYNAMICS OF THE SMALL GROUP
(FOR EXERCISE II-2)

PURPOSE:

To develop a list of group dynamics or elements that participants would want to observe in order to facilitate the group's process toward reaching training goals.

MATERIALS:

Flip chart or newsprint
Easel/tape
Felt-tip markers

INSTRUCTIONS:

1. Appoint a recorder.
2. Brainstorm a list of individual and interpersonal behaviors that can be seen in a working group.

SCENARIO

It is the 4th day of a 5-day training event for generic TOT.

You are five participants who came to the TOT with varying backgrounds, training experience, cultural differences, and so on. At this very moment, you have just been formed into a subgroup, charged with the task of designing and developing a 30-minute learning piece on giving feedback or on the issue of why people take drugs.

This is to be a group effort. It is up to the group to design and develop exactly what they wish to present.

Instructions:

1. Following is an outline of five roles. Each participant should select the role that he or she can most easily play. The small group as a whole can take part in this.

   ROLE 1 You are forceful and aggressive. You tend to cause a lot of tension in the group. You aren't necessarily the one to come up with ideas, but you often shoot down the ideas of others. If you feel unappreciated, you tend to try to get the group off the track by going off the subject.

   ROLE 2 You are on the timid side, often silent in a group. Generally, however, you remain aware of what is going on and are involved. Every now and then, you express what you think group members are experiencing.

   ROLE 3 You are a compromiser. In most groups you fulfill task roles, initiate activity, elaborate on the ideas of others, and coordinate and summarize. You tend to be supportive and agreeable.

   ROLE 4 You can be aggressive although it is not a side of yourself you generally show. You are known to take the part of anyone whom you feel needs help or has been treated unfairly. However, you try to be fair and to help solve problems and fulfill tasks.

   ROLE 5 You are full of ideas. You like recognition from other group members. You generally find one or two people that become enemies.

2. Once each participant has selected a role, he or she should take a few minutes to think about how to carry it out. A good way to do this is to exaggerate one's own natural traits, or choose traits with which you are very familiar.

3. Pin the number corresponding to your role where it will be visible to observers.

4. Assume that the discussion has been in progress for at least 20 minutes. One person might begin with a summary of what has occurred.

5. Begin.

WORKSHEET 11-3: PROBLEM SOLVING
(FOR EXERCISE 11-2)

	0				3'				6'			9'
	1	2	3	4	1	2	3	4	1	2	3	4
How well did the group stick to its job?												
How clearly did the group understand its problem?												
How well did the group get information?												
How well did the group use the information?												
How well did they test for agreement?												
How well did they accommodate for differences among members?												
How well were the communications conducted?												

At the end 3', 6', and 9', you are to rate the discussion group on each of the seven categories according to scale.

1 = not at all

2 = fairly well

3 = well

4 = very well

WORKSHEET II-4: BEHAVIOR OBSERVATION CHART
(FOR EXERCISE II-2)

As you watch the group at work, make tally marks (e.g., IIII II) when you see behaviors which fit in to each of the categories. Jot down examples if you like.

0 3' 6' 9'

Types of Behavior			
Fight behavior: attacking, being aggressive, ridiculing, showing negative feeling. Examples:			
Flight (non-participation) behavior: avoiding the problem, withdrawing, joking, going off the point, over-intellectualizing. Examples:			
Pairing behavior: being warm and friendly, intimate, supportive, agreeable. (Watch for opposite of this too--being impersonal, aloof, cold, and so on.) Examples:			
Dependency behavior: looking to the leader for support or direction; heavy reliance on structuring and defining of devices and procedures. (Watch for opposite too--rebellion, denial of need for structure.) Examples:			

WORKSHEET II-4 (CONTINUED)

Types of Behavior	0	3'	6'	9'
Work behavior: acting on the problems facing the group in a problem-solving way. Examples:				
Good communication patterns: descriptive feedback given, congruence between verbal and nonverbal behavior, appropriate listening, multi-directed communicatiions.				
Poor communication patterns: evaluative feedback given, lack of congruence between verbal and nonverbal behavior, little listening, restrictive channels of communications.				

WORKSHEET II-5: ROLE OBSERVATION CHART
(FOR EXERCISE II-2)

Categorize each statement made by role player into one or more of the roles listed. Write the number of the speaker every time a role is identified. List other roles played by any participants, particularly any roles that hinder the group's process. There is a time scale at the top so that the numbers can be put down in appropriate time sequence.

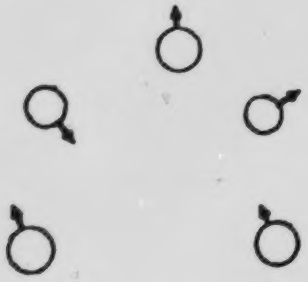
ROLES	0 to 3'	3' to 6'	6' to 9'
Task Roles			
Initiating activity			
Seeking information			
Seeking opinion			
Giving information			
Elaborating/Building			
Coordinating			
Summarizing			
Group Maintenance Roles			
Encouraging			
Gate keeping			
Following			
Expressing the group feeling			

WORKSHEET II-5 (CONTINUED)

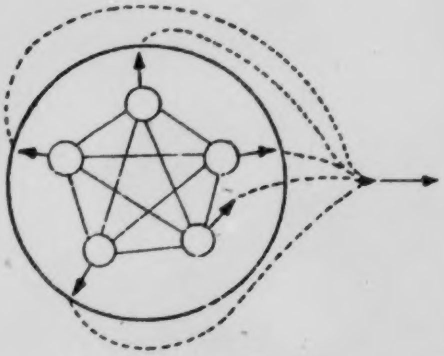
ROLES	0 to 3'	3' to 6'	6' to 9'
Task and Group Roles			
Evaluating			
Diagnosing			
Testing for consensus			
Mediating			
Relieving tension			
Negative Roles			

REFERENCE SHEET II-1: INTRODUCTION TO GROUP PROCESS AND FUNCTIONS

THE ESSENTIAL DIFFERENCES BETWEEN A COLLECTION OF INDIVIDUALS AND A GROUP (Knowles & Knowles, 1972)



A Collection of Individuals



A Group

In a collection of individuals that is not a group--

- there are no shared goals (the goal arrows of the various individuals are pointing in different directions);
- there is no boundary around the collection (indicating a lack of consciousness as a group and undefinable membership);
- there are no lines of interaction and interdependence connecting the individuals (the collection is unable to act in a unitary manner).

A collection of individuals becomes a group of people when--

- the members think of themselves as a group and they have an identifiable membership;
- they share a common purpose;
- each member's contributions are valued;
- an open and trusting climate develops;
- the members pay attention to how they work together
- the members can, when they choose to, act together as a single entity.

REFERENCE SHEET II-2
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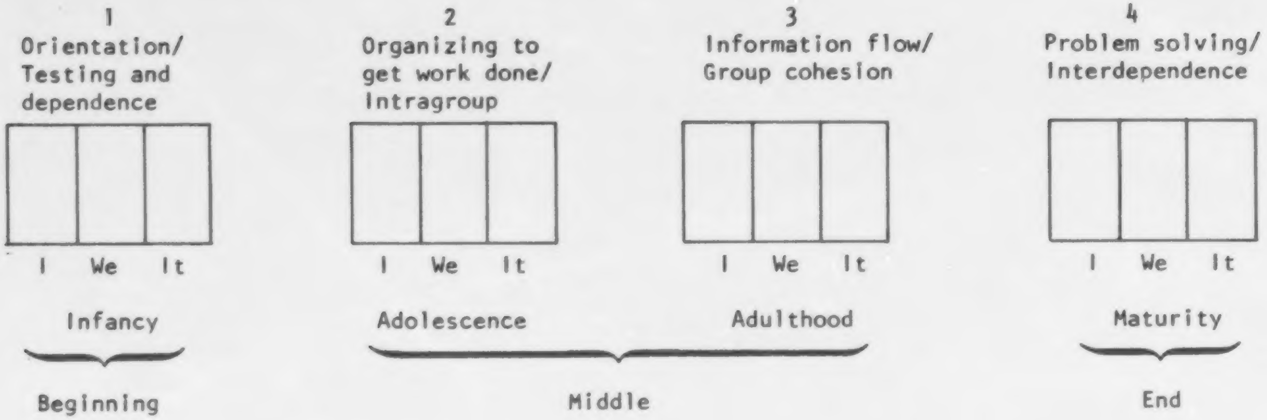
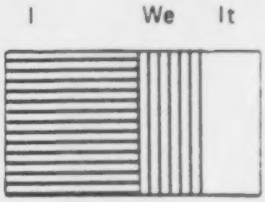
VISUAL 11-1
FRAMEWORKS FOR VIEWING GROUP GROWTH


1
Orientation/ Testing and dependence
2
Organizing to get work done/ Intragroup
3
Information flow/ Group cohesion
4
Problem solving/ Interdependence
I
We
It
I
We
It
I
We
It
I
We
It
Infancy
Adolescence
Adulthood
Maturity
Beginning
Middle
End

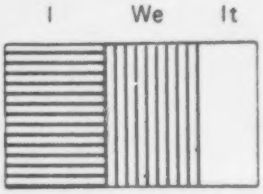
VISUAL II-2

THE STAGES OF GROUP GROWTH

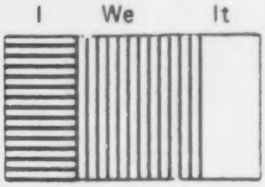
The following diagram shows different stages in the evolution of a group:



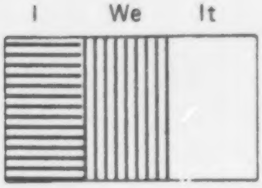
Phase I: Orientation, Testing, and Dependency



Phase II: Organizing to Get Work Done, IntraGroup Conflict



Phase III: Information-flow, Group Cohesion



Phase IV: Problem-solving, Interdependence

MODULE III: TRAINER STYLE

RATIONALE

Four major factors that influence the effectiveness of training course delivery were discussed in Module I. The trainer's presentation of self as a person and as a trainer is certainly a crucial factor. However, style is perhaps the most confounding aspect of preparing individuals to be trainers.

Style is conceptualized and defined here as those behaviors, traits, and affectations that serve to embellish the training and/or particularize and distinguish the trainer from others. Aspects of style include degree of control, patterned forms of interaction, style of dress, patterns of speech, and selection of vocabulary (particularly the use of the vernacular). Each of the dimensions noted are subject to variation from trainer to trainer. The constellation of these dimensions constitutes "style" as we use the term.

Consider that training programs (particularly those based on National Training System courses) assume standardization in objectives, content, and delivery. A particular manner of individual expression may support the delivery of a course (as determined by the instructional design), or such behavior may have a negative impact on the course delivery.

Several of the necessary preconditions that have been found to support training delivery are unqualified positive regard for each participant, maximum allowable freedom for each participant to experience and learn, and patterns of interaction that allow each participant to retain full adulthood while in training.

Some trainers possess these characteristics as a part of their style. Some must develop them, since inappropriate or inadequate attention to any or all of these adult learning needs can be expected to directly affect course delivery and outcomes.

Trainer awareness and knowledge of his or her own style, then, is a core issue. Self-analysis has the following benefits:

- Increased self-knowledge and self-acceptance.
- Exposure to styles different from one's own.
- Improved understanding of the fit between personal style and trainee needs.
- Improved ability to change patterns of behavior and interaction.

It is important to realize that there is no such thing as a born trainer. There is, however, a basic foundation (the trainer's personality, skills, and knowledge) from which greater expertise can be built.

This module will engage participants in several activities that will serve as a foundation in helping them to formulate for themselves their own right answers for questions such as:

- What's the fit between the course, the participants, and me?
- How do I want to work with a cotrainer? What do I need from him or her?
- Is this course for me to train? Do I agree with the objectives? Can I get across the content? Do I need a cotrainer?
- Can I work with these participants?

Answering the above questions about self should also provide a basis for further learning and growth.

Self-analysis can lead to a very conscious, consistent use of traits and skills in the training situation. A knowledge of how one comes across is particularly important in working with special or unfamiliar trainee groups where a trainer may be called upon to adapt his or her expectations or behavior as well as the materials. One group, for example, might find informal dress or sitting on desks so offensive that it is unable to relate to the other trainer or the course content presented by him or her. Another group may be unable to attain the kind of group cohesiveness that a particular trainer eagerly works toward attaining. Yet another group may be able to work only with an extremely directive trainer. Awareness of the many aspects of a trainer's style can only help trainers better meet the learning needs of participants.

SYNOPSIS

This module opens with a few brief words from the trainer as to why "style" was included as a separate module in the TOT course and with an overview of the activities participants will engage in (10 minutes). The first activity is brainstorming by the large group of ideas of the characteristics of a good trainer and of a poor trainer. A brief discussion that emphasizes the range of trainer behaviors is conducted to process the brainstorming (20 minutes).

Following this, participants individually engage in a self-analysis exercise for approximately 60 minutes, using the Training Style Inventory. (If a different instrument is chosen, this time will vary). This activity includes scoring and a brief discussion which helps trainers process the information and then move on to a very brief lecture that pulls together some issues about leadership/training style. A large group structured discussion follows in which consideration is given to how this self-knowledge can be applied (40 minutes).

The final activity of the module is a mini role play in which participants apply some of their insights about themselves by negotiating the ground rules of a relationship with a potential cotrainer (30 minutes).

The module closes with a summary of and reflection on what has occurred--materials, trainers, methods, and media (10 minutes).

MODULE III: TRAINER STYLE **TIME:** 3 HOURS 30 MINUTES

GOALS

- To gain insight into present training style and self-understanding of desired professional goals
- To gain the motivation to consider options for strengthening deficiencies in style
- To facilitate self-assessment of tendencies within the trainer's own style that frustrate adult learners
- To understand issues relevant to cotraining.

OBJECTIVES

At the end of this module, participants will be able to:

- Give parameters of different styles
- Make a statement that is descriptive of his or her own style, after using a self-assessment inventory
- List three trainer traits felt to be worth working toward
- List four trainer traits that are felt to be understandable
- List four issues to negotiate with a cotrainer.

MATERIALS

- Flip chart or newsprint
- Easel/tape
- Felt-tip markers
- Overhead projector and transparencies (optional)
- Participant Manual

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES

10 MINUTES

1. MODULE OVERVIEW

- Give the rationale for including a module in which participants are directed to examine their fantasies about trainers and the realities of their own styles in training.
- Present an overview of the module's activities related to module objectives.
- Refer participants to the goals and objectives for Module III in their manuals.

Information for this overview is found in the rationale and synopsis sections of this module on the preceding pages.

- Make these important points in the discussion:
    - Often trainers have internalized the idea that there is some ideal trainer; this prevents an assessment and honest appreciation of what he or she is and does.
    - Unless a trainer understands how he or she works--the elements of his or her own style--he or she cannot build on a firm foundation or change undesirable behavior.
    - If a trainer's style does not include such dimensions as unconditional positive regard for participants, maximum allowable freedom for participants to experience learning, and interactional patterns that permit participants' full adulthood during training, the trainer must work at changing behaviors and attitudes that are in the way. (See Selected Reading III-1 in the Participant Manual and Reference Sheet III-1 in both manuals for more overview material.)

Selected Reading III-1
Reference Sheet III-1

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5 MINUTES

2. DISCUSSION: GOOD TRAINER AND POOR TRAINER CHARACTERISTICS

It is difficult for most people to feel free about self-examination, particularly in a group situation.

TIME, MEDIA, AND MATERIALS

OUTLINE OF TRAINING ACTIVITIES

Sometimes an exercise that exaggerates the parameters of the feasible serves to loosen up people and to therefore allow them to be more self-disclosing. Choose one of the following activities to achieve this end.

---

15 MINUTES

Flip Chart/Easel
Newsprint
Felt-tip Markers

3. EXERCISE III-1: GOOD TRAINER/POOR TRAINER

- Facilitate a brainstorm activity in which group members are requested to come up with a list of characteristics--traits and skills--for a good trainer and a poor trainer.
- Hang two pieces of newsprint.
- Cotrainer or appointed recorders write responses on newsprint.
- As with any brainstorm activity, encourage many quick, spontaneous responses. Criticism of the responses is not allowed at the point where lists are generated.
- In facilitating the brainstorm, help group members exaggerate each characteristic so that each is, indeed, good or very poor. For example.

  Trainer picks up on every nuance of group process.

  vs.

  Reference Sheet III-2

  Trainer sticks to content and misses the boat totally on process. See Reference Sheet III-2 in both manuals for further examples.

- Allow no more than 5 minutes to develop each list.
- Elicit from participants the wide range of behaviors between the "good" and the "poor" trainer in order to process the items generated during the brainstorm.

TIME, MEDIA, AND MATERIALS

OUTLINE OF TRAINING ACTIVITIES

The object in doing this is to put some reality into the extremes that participants often feel their own behavior reflects.

- Have participants match up the extremes and discuss ideas about their own skills and behavior in terms of those extremes. For example:
    - Ask how many fall somewhere between picking up every nuance of process and missing the boat?
    - Ask what might be realistic within any good-poor range.
    - Ask what does it really mean to be or do, pointing out particular items on the brainstormed list.

NOTE: One of the following activities may be substituted for the brainstorm activity described above. Their purpose is similar in that participants are encouraged to voice and get in touch with their fantasies about "supertrainers" towards beginning to make realistic and useful self-appraisals.

Flip Chart/Easel
Newsprint
Felt-tip Markers

EXERCISE III-1, OPTION A: SUPERTRAINER

- Find a participant with graphic skills who can put into visual format descriptions given by participants of a mythical supertrainer.
- Request descriptions from the large group.
- Have participant-artist convert them into a drawing. Some of the descriptions that may be illustrated, for example, are:
    - "Wears many hats."
    - "Walks on water."
    - "Is faster than a speeding bullet at intervening."
    - "Uses all kinds of media."

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
	EXERCISE III-1, OPTION B: SUPERTRAINER • Divide large group into small groups of approximately five people. • Have each group come up with a sketch of its idea of a supertrainer. Processing Option A or Option B Exercise Whichever alternative is used, the supertrainer exercise is processed in the same manner as directed for the brainstorm--that is, to elicit a list of the wide range of behaviors between good and poor training so that participants put some reality into the extremes they feel their own behavior may represent. Devote approximately 10 minutes to this discussion, which serves as a warm-up for participants to begin their formal self-analysis.
90 MINUTES	4. EXERCISE III-2: SELF-ANALYSIS OF TRAINER STYLE
Selected Reading III-3	The Training Style Inventory (TSI) A variety of instruments may be used to enable participants to begin to examine their personal styles. The use of the Training Style Inventory (TSI) is suggested and outlined here because it is held to be: - Sufficiently self-revelatory without being threatening to participants. - Concise and time-limited.
Selected Reading III-2 Reference Sheet III-3	NOTE: However, many other instruments would also be appropriate. An article on the Myer Briggs Type Indication is included in the Participant Manual as Selected Reading III-2. Other alternatives are also listed in Reference Sheet III-3 (both manuals). The trainer is encouraged to obtain an alternative and to use it (or adapt it for use) at this point in the course either instead or in addition to the TSI. The

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
	choice to be made depends only on the trainer's knowledge of the training group needs and time considerations. ● Stress that participants will not be compelled to share any results except in the most general way and then only insofar as they may wish. ● Direct the group to begin scoring when participants have completed their inventories or when 1 hour has elapsed. Offer individual help as needed. ● Allow participants to use the remaining 30 minutes for scoring their inventories. ● In processing the TSI scoring, do the following:
Selected Reading III-3	- Direct participants to read "TSI Style Contrasts," contained in Selected Reading III-3. - Ask who was surprised by their results. - Ask which orientations are more in line with adult learning theory (andragogy) and which with pedagogy. - Ask what kinds of learning methods best fit the different orientations, trainer comfort, etc.
5-15 MINUTES	BREAK
40 MINUTES	5. DISCUSSION: TRAINER STYLE ● Develop a brief presentation that covers the five points outlined below: 1. Different frameworks and word sets for defining trainer style; for example,

MODULE III: TRAINER STYLE

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
Reference Sheets III-4 and III-5 Selected Reading III-4 Visual III-2	"directive" vs. "nondirective" or "authoritarian" vs. "laissez faire." (See Reference Sheets III-4 and III-5 in both manuals and Selected Reading III-4 in the Parpant Manual.) (Use Visual III-2 to make this point.)
Visual III-1	2. Stages of group growth related to trainer style and what is appropriate at any particular stage. (Refer back to Visual III-1 to make this point.) One of the major points to be developed here is that any style can be appropriate given the content to be delivered and the kinds of facilitation required. Another important point is whose needs get met during a trainer event--the trainer or the participants.
Selected Reading III-5	3. Trainer growth and professional development. (See Selected Reading III-5.)
Reference Sheet III-6	4. Trainer ethnics--the power of the position. (See Reference Sheet III-6.)
Selected Reading III-6	5. Issues in cotraining. (See Selected Reading III-6.)
	● Raise the following questions in the discussion following your lecture to stimulate the group to process what they have heard: - To what extent does your ethnic (cultural, minority, sex) orientation relate to or impact on your style? - Where do you see yourself on any of the style continuums? - Can you see a trainer modify his or her approach during the course of a training event? Why? - In what ways might the trainer's role be a frustrating one? - How do you see ethics and power as issues related to the trainer role?

MODULE III: TRAINER STYLE

TIME, MEDIA, AND MATERIALS | **OUTLINE OF TRAINING ACTIVITIES**

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30 MINUTES

6. ROLE PLAY: CONTRACTING WITH A COTRAINER

How a person works with and relates to another person is often extremely revealing regarding his or her behavior and attitudes. Contracting a working relationship with a cotrainer can be a learning experience that uses and expands the knowledge of self. Such contracting, of course, has the extremely useful benefit of paving the way for mutually satisfying training experiences for trainers and trainees.

- Facilitate dyadic role plays by:

Worksheet III-1

  - Directing trainees to the instructions on Worksheet III-1 of their manuals.
  - Aiding the formation of dyads.
  - Directing participants to read and choose a role and to refrain from disclosing the choice.
  - Starting the role plays.
  - After 20 minutes, process the role plays' experiences by facilitating a discussion of the following points.

    a) Satisfaction with the "contract"
    b) Problematic issues
    c) Interesting issues.

---

10 MINUTES

7. MODULE OUTCOMES

- Close the module by facilitating:
  - A review of module content and a brief discussion of the extent to which goals and objectives were met. (Goals and objectives can be found in the front of Module III in the Participant Manual.)
  - A brief discussion of the module as a model, methods and media used, trainer

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
	style, facilitative and delivery skill, and participant interactions.
	● As part of your summary, point out to participants resources for continuing development such as:
	- Local training organizations
Reference Sheet III-7	- Specific publications, many of which are listed in the bibliography for this module (Reference Sheet III-7 in both manuals).
	END OF MODULE III

WORKSHEET III-1
MINI ROLE PLAY

PURPOSE:

To use knowledge of style to develop an effective working relationship with another trainer with whom the trainer is unfamiliar.

MATERIALS:

Scenarios and roles

PROCEDURE:

1. Form dyads.

2. Separately, read the description of the course you will deliver together the following day. Then, choose your own role and decide how to handle it. (It does not matter if both of you choose the same role.) Do not disclose which role you have chosen.

3. Discuss/negotiate how you would like the training to go with your cotrainer. In arriving at a contract, highlight the following:

    a) Will you be co-equal or lead-subordinate or some other permutation?

    b) When one of you is "on," how should others act?

    c) How roughly might you divide up the delivery and facilitative roles?

    d) How will you prepare for delivery (i.e., some trainers design on the back of an envelope enroute to the event. Others come super prepared with, for example, flip charts already made; some stagger in with book and other resources). How have each of you prepared? Is there a fit?

    e) Identify anything else that is important to you.

4. Reconvene in the large group and discuss satisfaction with the contract, problematic issues, and interesting issues.

TIME:

30 minutes for role plays
10 minutes for large group discussion

SCENARIO

It's evening.

You arrived in town a few hours ago. Tomorrow morning you will begin training ____________________.

This course requires a fair amount of technical knowledge of __________, which gets played out in several lecture-type presentations.

However, there are many experiental activities to get across the learning.

ROLE

Choose the role that is most appealing to you. Do not disclose your role to your partner. It does not matter if you both choose the same role, since each may add to whatever role you've chosen the personal style characteristics of your own or of other group members that you learned about in earlier sections of this module.

ROLE 1: You are a very experienced trainer. You've trained this course several times before alone and with a cotrainer. It is difficult for you to share, but you are aware that you like the didactic material a fair amount better than processing it and the exercises.

ROLE 2: You have not done much training and have never given this particular course. You've prepared as thoroughly as anyone could; in fact, you prepared as if you were to be the sole trainer.

ROLE 3: You haven't much experience with this course although you have done a fair amount of training. You particularly enjoy the facilitative aspects of training. You are not particularly into media and methods, but would rather "draw it out of" participants.

ROLE 4: You consider yourself a "technician." While you believe in group process, you enjoy using many methods and just the right media to get the material across. You believe "a picture is worth a thousand words" and are very task oriented.

REFERENCE SHEET III-1
THE TRAINER IN RELATION TO FACTORS IN THE TRAINING ENVIRONMENT

LEARNING CLIMATE

Trainers talk a lot about developing a "good" learning climate: an atmosphere within the training session that is conducive to learning. Many factors affect the learning climate.

Cognitive theorists stress the importance of a psychological climate of orderliness in which goals are clearly defined; expectations and opportunities are carefully explained; a system that is open to inspection and questioning; and there is opportunity for honest and objective feedback. The cognitive theorists who emphasize learning by discovery also favor a climate that encourages experimentation (hypothesis-testing) and that is tolerant of mistakes, as long as one learns from those mistakes.

Personality theorists, especially those who are clinically oriented, emphasize the importance of a climate in which individual and cultural differences are respected; anxiety levels are appropriately controlled (enough to motivate but not so much as to block); achievement motivations are encouraged for those who respond to them; and feelings are considered to be as relevant to learning as are ideas and skills.

Humanistic psychologists suggest that we attempt to create a psychological climate in which the individual feels that others are accepting, trusting, respecful, and understanding. Some psychologists (especially field theorists) emphasize collaboration rather than competitiveness, encouragement of group loyalties, supportive interpersonal relations, and a norm of interactive participation (Knowles, 1973).

Establishing training norms that facilitate the learning process is essential for a good learning climate. Norms are standards of expected behavior that reflect the values of the majority of the group members. A group often develops its own norms. As in the larger society, norms become the basis for evaluating a member's behavior and, therefore, have the effect of controlling members of the group. Norms may be clearly expressed (explicit), or may be only implied (implicit). If shared by the group and reinforced by the trainer's attitude, the following training group norms will enhance the learning climate (Miles, 1973).

- *It's safe to try things out here.* The purpose of this session is to explore ideas and behavior. No one is being evaluated or judged. Not only is it permissible to try out new ideas or behaviors, it is also highly desirable and an important part of successful training. In training one can learn to explore ideas without putting down the speaker, to understand why others have different points of view, and to experiment with new behaviors.

- *People are important.* Very often workers in the helping professions can be heard to say, "People are important,"; yet they behave in ways that ignore the feelings of others. Working daily with people who have many problems, in an environment where the constraints are many and the satisfactions few, may actually desensitize staff members to human needs and emotions. In the controlled environment of a training group people can receive feedback about their behavior, resensitize themselves to others, and gain awareness.

- *Thoughts, feelings, and behavior are important.* In the helping professions, thoughts, feelings, and behavior are the basic data from which to work. Initially, participants may need to be encouraged by the trainer to express their thoughts and feelings and to examine the behavior they exhibited in the training session. If the trainer demonstrates an accepting, nonjudgmental attitude and endorses this behavior from the total group, participants will begin to encourage each other to discuss their personal beliefs. By discussing their beliefs in a group setting, people become aware of their attitudes and the ways in which these attitudes influence their behavior.

- *Things are not taken personally; we can examine what's happening here and now.* When the trainer responds objectively to expressions of feeling, he demonstrates that it is possible for group members to observe their feelings and learn from them. This does not mean that the trainer acts as though he has no feelings about what has been said. It means that the trainer expresses his feelings in an objective manner using the EIAG process. Through his behavior, the trainer demonstrates a process that group members can use to articulate and examine their own experiences without becoming trapped in highly emotional exchanges that may alienate them from the group. He helps members examine what's going on here and now in the group situation so that participants begin to comprehend how their feelings and behavior influence what is taking place.

- *Careful analysis and emotional support are possible and valuable.* As the trainer comments on, generalizes from, and raises questions about the experiences the group has been going through, he guides group members to think about these experiences and analyze the group process. Since the training group experience requires that members expose their own behavior to analysis and that they be willing to try things out to see what happens, the trainer should provide emotional support for group members as they work and learn. As the group work proceeds, the type of support that the trainer demonstrates becomes a group norm. Support, then, comes more and more from other group members. Typical support behaviors are: acting to reduce excessive conflict, encouraging members as they try out difficult things, and using EIAG to relieve group tension when it obstructs the learning process. Success depends on everyone feeling free to actively take part, to comment, to criticize, to make suggestions, and to listen to one another.

The trainer must be careful, however, not to exaggerate a training group's need for support. Excessive trainer support may result in dependence, or in a phony atmosphere of sweetness and light. Learning about one's attitudes, beliefs, and behaviors, and how they affect others may be a painful experience but it is also a rewarding one. The trainer needs to exhibit his conviction that group members are mature enough to learn from experiences, even if those experiences are painful. The trainer needs to be supportive enough to permit the group to grow and learn, but not so supportive that he promotes overdependence.

A productive level of tension is necessary to encourage participants to examine their assumptions and to integrate new information. If the training climate is an open and honest atmosphere where everyone involved feels free and responsible for his own learning, the training activities will facilitate exploration of differing points of view; this creates the moderate level of tension necessary for a good learning climate. Trainers should be careful not to push participants to expose too much of themselves too soon. Trainees should be encouraged to express their thoughts and feelings, and to be silent when they desire.

. . . A climate is developed as people spend time together and break through the initial formal, "ice-breaking" period . . . climate is a variable produced by the expectations of members modified by their perceptions of the present situation and their degree of interaction and communication (Gorman, 1975).

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THE ROLE OF THE TRAINER

Each person must find his own "style," his own way of behaving with a group. Some guidelines:

- *Create the climate described above.* Behave in ways that demonstrate this climate for the group. Support people who try things out. Uphold those standards when members of the group don't follow them. If someone becomes critical or ignores the feelings of other people, describe what you see happening. Explain your concern about its effect on the group's learning climate, but do not be critical of them yourself; otherwise, your behavior contradicts what you are saying.

- If the group flounders or begins to lose sight of the overall purpose of the session, introduce techniques, nonverbal exercises, etc., to *help get things going.*

- *Give your own opinions and feelings.* Be a person. Let people realize that you feel part of the group and that you care about their problems.

- *Flow with the group.* Let group members have as many chances as they can to experience success in *Identifying, Analyzing and Generalizing.* These experiences improve their skills. The more *Experiencing, Identifying, Analyzing, and Generalizing* they do in the group, the more likely they will be to use this method of looking at their performance and improving it when they return to their jobs.

- *See yourself as a resource person,* a helper rather than the leader or key person in the group. The people have to go back to their jobs and function without you. If you become too important they won't be able to take what they have learned and apply it on their own. So don't:

  be overly directive with the group

  speak before other group members can collect their thoughts

  comment excessively

- *Respond to situations as they arise.* Your feelings are your best guide. Trust your own ideas and do what seems right to you at the time. Later, go back over the things that happened; figure out why they happened and what else you could have done. You are a learner, too.

Observing During the Session

Watch what is going on and try to understand it--even while you are participating. In your mind, step back frequently and try to form an overall picture of the session as it progresses, including your behavior and feelings. Discuss your reactions with the other trainers during a break. You may spot something (or someone) blocking people from learning. See what progress people are making and what changes in behavior are happening. Keep an eye on the climate for learning, checking to see how well it follows the guidelines described above.

Some things to watch for are:

- Who talks and who doesn't at different times
- How much people really listen to each other and the trainer
- How people sit, what their facrs say, what they do with their hands, etc.
- What subjects come up again and again
- What interrelationships show up, what groups form, who interrupts whom, who follows whom
- How the group as a whole makes decisions and solves problems
- What patterns seem to devleop

Concentrate on *what* happens and *how* it happens, rather than on *judging* what is happening.

REFERENCE SHEET III-2
DESIRABLE TRAINER CHARACTERISTICS: A SAMPLE LIST

Self-awareness, including a sense of the impact of his or her own behavior on others.

Ability to receive feedback from the environment.

Ability to encourage the taking of risks without humiliating participants.

Ability to deal with own feelings and the feelings of others.

Understanding and ability to manage group process.

An ability to make appropriate interventions, especially feedback, even when it is perceived as painful.

Ability to make clear presentations.

Ability to establish objectives and to move a group towards them.

Group facilitation, including the ability to let the group work on its own.

Cultural sensitivity to the many different ways of viewing things.

Ability to understand group process and the stages of group life.

Flexibility and adaptability in regard to the group's needs.

Ability to make good charts.

Planning and organizing presentations, the how and when of interventions.

Good delivery skills; stand-up skills.

Respect for needs of adult learners and ability to put adult learning theory into practice.

Holds all group members in "unconditional positive regard."

Has patience and paces self in accordance with the group's developmental phase.

Has communication skills.

Can deal with volatile material.

Can evaluate the training event.

Able to model behaviors that are taught.

Can allow criticism of self.

POOR TRAINER CHARACTERISTICS: A SAMPLE LIST

Uses warnings and threats to get group moving.

Intervenes excessively.

Is the center of the process; does not allow group to work on its own.

Subtly or overtly insists on particular behaviors from group members.

Has little awareness of his or her impact on others.

Is not able to receive feedback.

Humiliates participants into taking risks.

Is unable to respond to process.

Avoids giving feedback when it is painful.

Poor delivery skills.

Gives unclear or disorganized presentations.

Lack of sensitivity to cultures or viewpoints different from his or her own.

Rigid and unadapting with regard to group's needs.

Unable to plan and organize events.

Violates needs of adult learners.

Does not expect to have respect or positive regard for all participants.

Poor communication skills.

Impatient and poor at pacing himself or herself.

Spends no time or is unable to evaluate a training event.

Is intolerant of any criticism directed at him or her.

REFERENCE SHEET III-3
ALTERNATIVE CHOICES FOR PERSONAL STYLE EXPLORATION

1. Myers-Briggs Type Indicator.

Isabel Briggs Myers, co-author of the test, lives in Swarthmore, Pennsylvania, telephone number, (215) KI3-5538.

Educational Testing Services (ETS) sells copies of the test questionnnaire, blank answer sheets, and template cards for scoring the test. The ETS address is:

Educational Testing Services
17 Executive Park Drive, N.E.
Atlanta, Georgia 30329
Telephone: (404) 325-3131

Note: The scoring cards won't work with photocopied answer sheets. You will, therefore, have to order these.

ETS also sells a manual that accompanies the test. Trainers may administer the test and the Personal Style module without the manual. These guidelines contain a sample of the booklet, Introduction to Type, by Isabel Briggs Meyers.

Also included is the trainer rap (lecture), which explains the theory of Jungian typology.

2. The FIRO-B scales (Fundamental Interpersonal Relationship Orientation), by William C. Schultz.

A self-report questionnaire designed to assess a person's need for 1) inclusion, 2) control, and 3) affectation in interpersonal relationships. FIRO-B relates to behavior which a person directs towards others and which he wants others to direct toward him. Order from:

Consulting Psychologists Press, Inc.
577 College Avenue
Palo Alto, California 94306

3. POI (Personal Orientation Inventory), by Everett L. Shostrom.

A self-scoring instrument designed to assess values, attitudes, and behavior relevant to Maslow's concept of the self-actualizing person. Order from:

Educational and Industrial Testing Service
P.O. Box 7234
San Diego, California 92107

4. Transactional Analysis (TA).

The popularity of the Parent-Adult-Child construct as applied to business and training as well as personal growth laboratories, indicates the usefulness of this approach to self-awareness. If you decide on TA, get a skilled TA trainer and give him or her Module IV to read for focus and direction.

5. LIFO (Survey of Life Orientations), by Alan Catcher.

A sophisticated program which contains professional training for persons administering it, questionnaires and applications workbooks, and a series of guided exercises. Moves beyond simplistic "typing" into identifying how to use one's personal style constructively in a variety of situations. Order from:

Atkins-Catcher Company
8383 Wilshire Blvd.
Beverly Hills, California 90211

6. ISS (Intervention Style Survey), by B.H. Arbes.

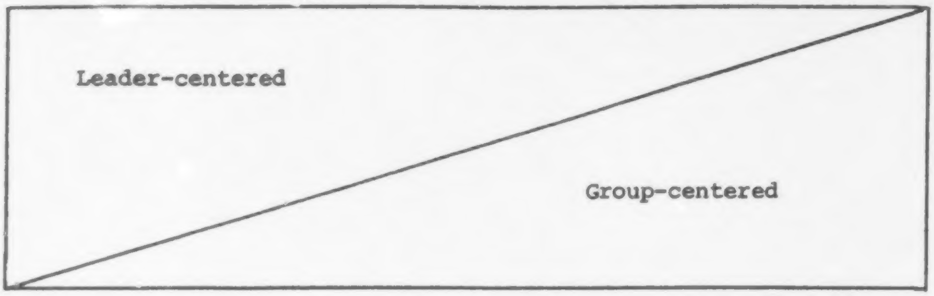
Based on the Blake/Mouton management grid model, ISS identifies five types of leadership styles in student personnel deans. (Can be adapted for trainers.) All explanations and materials are in the 1972 Annual Handbook for Group Facilitators, by Pfeiffer and Jones, pp. 75-85. The handbook may be ordered from:

University Associates Publishers, Inc.
7596 Eads Avenue
La Jolla, California 92037

REFERENCE SHEET III-4

INTRODUCTION TO LEADERSHIP STYLES

Styles of leadership can vary from autocratic to laissez-faire, from a style in which decisions are made only by the leader to one in which decisions are made only by the group. If we represent these styles graphically, they look something like this (Napier and Gershenfeld, 1973):



Leader decides, announces decision (autocratic)

Leader presents tentative idea, subject to change (democratic)

Group defines boundaries and decides (laissez-faire)

In the extreme leader-oriented (autocratic) style, the leader determines the problems and makes the final decision. He/she is often concerned that the group functions efficiently and accomplishes the tasks set before it. The process of the group, or how the members work together, is of little interest to the autocrat. This leader focuses almost exclusively on content.

In the extreme group-oriented (laissez-faire) approach, the group is allowed to determine the problems and to make the decisions. This leader keeps a very low profile and is content to let the group set its own course. To the laissez-faire leader, the end result is much less important than the question of how the group gets there.

In between the two extremes are any number of combinations of group and leader orientation. Most often, the style of a group leader is somewhere in the middle--such a leader might determine the area on which the group should focus and then will help the group work through the issue.

Although everyone has a style of leading with which he/she is most comfortable, conditions often exist that create pressures to adopt a more leader-centered or group-centered approach. *Factors that generally favor greater leader involvement are the following:*

1. *The urgency of the problem:* When a decision *must* be reached quickly, the leader may need to make the decision. Decisions made by the leader are usually reached more quickly than are decisions made by the group.

2. *Lack of group skills:* When a group has not developed a system for processing issues or is unclear about its goals, the leader is likely to assume a larger role.

3. *Expectations of the leader:* In many groups, members have unrealistic expectations of what the leader can do for them. Sometimes the group will pressure the leader (as the "expert") to make decisions for them.

4. *Leader discomfort:* The novice leader, especially, may feel uncomfortable when he/she perceives that nothing is happening in the group. A common response to this is to try to initiate some activity by taking charge.

Parallel conditions exist that promote greater involvement by the group.

1. *No time pressure:* If a group has no time limits, the leader can afford to sit and wait until the tension level of the group rises and the group initiates its own activity.

2. *Group skills:* When a group is established and the members trust each other and are comfortable in their roles, the leader often can stay in the background and let the group lead itself. But even this mature group may require direction from the leader if it becomes counterproductive.

3. *Group potency:* When the group has developed a cohesiveness, the members often will not rely on the leader, but will look for leadership from within the group.

4. *Leader comfort:* The leader who has been through uncomfortable situations before is likely to be less threatened when they recur. He/she may choose to sit back and allow tensions to build to the point where the group must examine the problem.

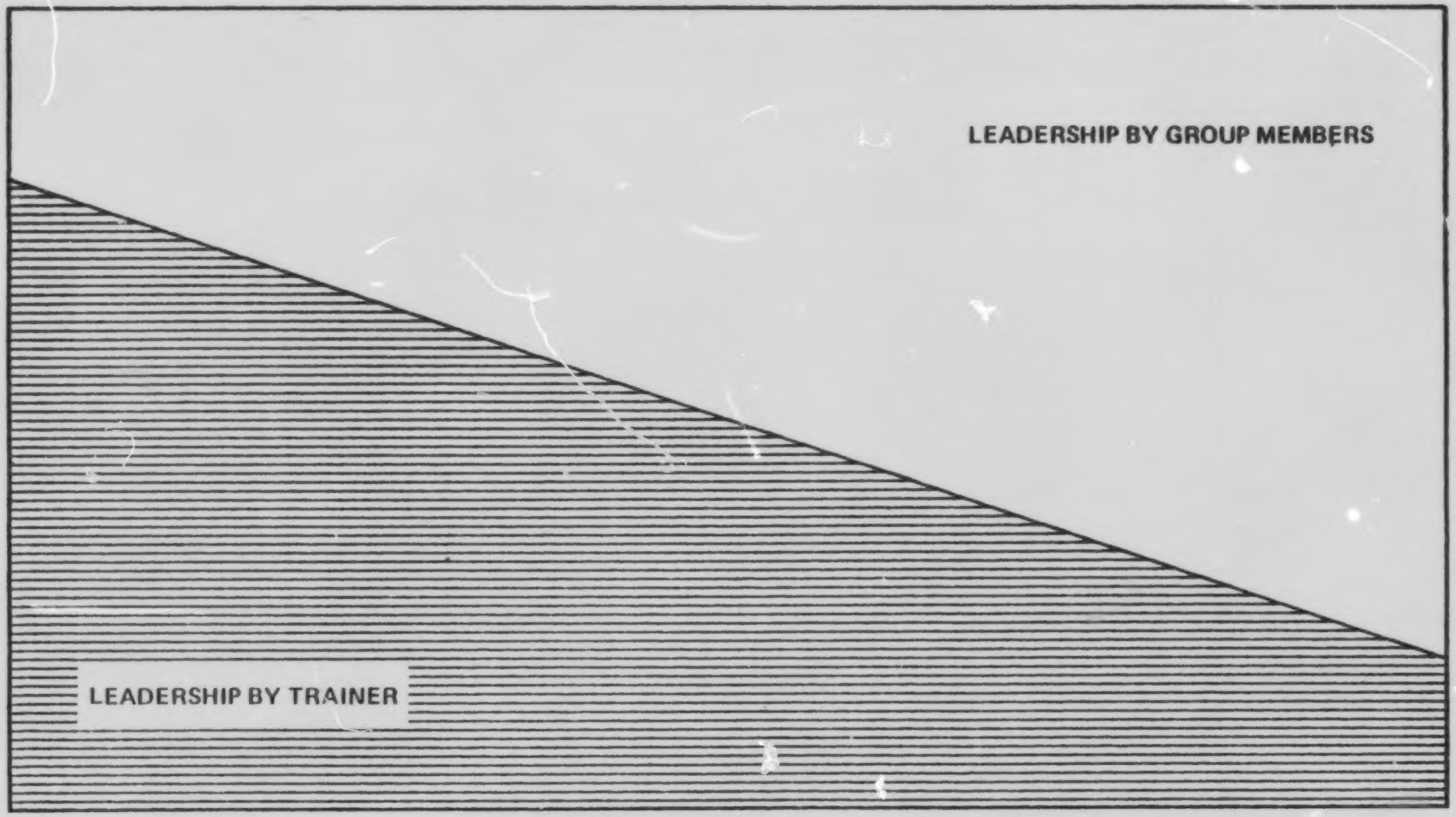
REFERENCE SHEET III-4 (CONTINUED)

The question of appropriate leadership styles arises in every group. Of course, many factors are specific to each group (for example, the composition of the group) and these affect the style of leadership. But many groups also progress through stages where different functions may be required of the leader. For instance, in the early stages of a group, the leader may have to be more directive, setting norms and goals and helping the members get acquainted. The leader must be careful, though, not to establish a precedent where the members rely on him/her to resolve group issues. Then at a later stage, the leader may want to become more nondirective and let the group resolve its problems through procedures established since the group's inception.

No leadership style can be considered foolproof. A directive leader probably will be confronted with aggressive and blocking behavior and challenges to his/her authority. The nondirective leader will encounter demands for more structure by group members. The effective group leader must be aware of the different leadership strategies appropriate to the stage of group growth and to the problems the group is facing. Fnnally, he/she must realize that, even with appropriate leadership, tensions are bound to arise occasionally. Although these tensions can make the leader uncomfortable, they often are helpful in promoting group growth.

GROUP LEADERSHIP

(Shift From Single To Shared Leadership)



Authority is delegated to trainer by group members.	Trainer helps members identify their group problems and find ways to cope with them.	Within given limits, group members assume responsibility for identifying their problems.

REFERENCE SHEET III-6

TRAINER ETHICS

I. INTRODUCTION

A. Definition of Ethics: *Rules of human conduct recognized in respect to a particular class of human actions or to a particular group, culture, or discipline;* (in this case, the behavior of trainers in the discipline of training.) Random House Dictionary of the English Language, College Edition

B. Why Consider Ethics

1. A code of trainer ethics is essential to develop awareness of the responsibilities and limitations of the trainer. Such a code is also necessary in developing a professional attitude and approach to training.

2. Adherence to a code of ethics that reflects trainer responsibilities and appropriate trainer behavior helps insure quality training.

3. Adherence to this code also helps to insure a useful, positive experience for the participant--in terms of both skill acquisition and personal comfort--rather than a destructive experience.

C. Areas of Responsibility

1. Responsibility to himself.

   For example: the trainer should feel self-satisfaction and pride in his training effort and delivery.

2. Responsibility to the participants.

   This includes responsibility not only to the individual learners, but also to the programs in which the participants work. (See II. Ethical Issues outline for discussion.)

3. Responsibility to his profession, his colleagues, co-workers, and the training field.

4. Responsibility to the program.

When one is training, he represents not only himself, but also the agency or program in which he works. He has a responsibility to deliver training in a manner that is a credit to that affiliation.

II. ETHICAL ISSUES

The following are specific guidelines that a trainer must use to establish a code of ethics in order to carry out the four areas of responsibility outlined above.

A. Selection of Participants

The trainer clearly articulates to prospective participants the criteria for recommended selection of individuals for a particular training experience. The trainer is aware of potential problem areas, and, to the limited extent that personal difficulties are predictable and screening procedures can reasonably be implemented, prospective participants should be selected on the basis of these principles.

1. Persons whose goal in participating would be to seek aid in or a cure for emotional disturbances are considered inappropriate to this course.

2. Experience has shown that participants who are personally motivated and have volunteered for training have the greatest potential for success. Those who are responding to demands or wishes of another, e.g., an employer, may be inappropriate where training demands a high level of commitment from the participants.

3. Trainers may want to indicate in stating selection criteria that priority of selection should go to those individuals who have, in their own work setting, a position of responsibility to make use of the skills in which they will be trained. Second priority would be given to persons seeking a training experience solely for personal growth.

B. Goal Clarification

1. The fantasies and pretraining expectations that participants bring to a group will represent as many different interpretations as there are group members. The trainer, then, is the agent

upon whom the clear statement of goals and intentions is predominantly dependent.

2. The trainer must be clear at the beginning and maintain clarity of definitions and appropriateness of interventions throughout the group experience.

    a. This is especially true where goal clarification relates to skill building vs. therapy.

    b. Consideration of contracting for or negotiating individual learning needs applies here.

    c. Includes consideration of appropriate application of skills and limitations learned in training. For example:

        Completion of a counseling skills course does not necessarily qualify an individual to be a trainer of that course.

C. Accountability

The trainer makes a clear statement regarding his commitment to imparting specific information and skills, and/or conducting specific activities. He builds in evaluation mechanisms by which the learners, the employer, or the trainer may assess the meeting of that commitment.

D. Values and Philosophies

The trainer is aware of his personal values and philosophies, those of the participants, and those espoused by the group to which the trainer is accountable. The trainer recognizes that those values will not always be congruent, but that they should be compatible to the extent that training can be conducted without violating the validity of the point of view or the worth of any individual or program. Subjects that need to be considered are:

1. Political viewpoints

2. Sexual roles

3. Ethnic-racial and intercultural issues

4. Societal norms

5. Approaches to drug abuse

6. Therapeutic style

E. Competence

The trainer recognizes the boundaries of his competence and the limitations of his techniques and does not offer materials nor use techniques that fail to meet professional standards or with which he is unfamiliar.

F. Misrepresentation

A trainer does not claim, either directly or by implication, professional qualifications that exceed his actual qualifications, nor does he misrepresent his affiliation with any institution, organization, or individual, nor lead others to assume he has affiliations that he does not have. The trainer is responsible for correcting others who misrepresent his professional qualifications.

G. Acknowledgements

The trainer clearly indicates any known ownership, authorship or credit for the materials, concepts, and methods that he utilizes in presenting training. The trainer acknowledges any support or aid provided by persons assisting in preparing or presenting training. Where possible, acknowledgements are made in writing. Attributions of authorship for materials (and permission granted for their use) should be in writing.

H. Trainer Influence

The trainer is aware of the disproportionately large degree of influence he has upon the group and facilitates the group in understanding the need for continual assessment of this leadership factor. The trainer uses this influence in a way that facilitates learning, according to the agreed upon goals, and does not overstep these boundaries. The trainer actively seeks feeback from the group as well as from his colleagues in order to insure participants' involvement in group decisions.

I. Moral and Legal Standards

The trainer in the practice of his profession shows responsible regard for the social codes and moral expectations of the community in which he works. He recognizes that violations of accepted moral and legal standards on his part may involve the participants and/or his colleagues in damaging personal conflicts and impugn his own name and the reputation of his profession. He also recognizes that his congruence with the social and moral expectations of the community in which he works will facilitate more effective training.

1. Experience has shown that trainers becoming sexually involved with participants during training may be highly volatile; this is inappropriate trainer behavior.

2. Participating in illegal drug taking behavior and/or excessive legal drug taking behavior with trainees is also highly volatile and inappropriate.

J. Confidentiality

The trainer respects and protects the integrity and confidentiality of the group or individual with whom he is working.

K. Referral Services

The trainer recognizes that emergency medical and/or mental health referral services may be required, and seeks to obtain direct access to those services and to utilize them when appropriate. An effective referral by a trainer includes a clear rationale for the referral, consultation with at least one other trainer or supervisor when available, confidential communication, and follow-up.

Return-to-home procedures should also be clearly designated.

L. Personal Growth and Improvement

The trainer accepts his responsibility to maintain the highest standards of training and develops his skills as the state of the art develops. He continually seeks to improve on those skills already acquired and to expand the range and scope of skills and knowledge that he can apply professionally. Whenever possible, the trainer seeks supervision of training activities he conducts, and actively solicits feedback from participants, trainers, and supervisors.

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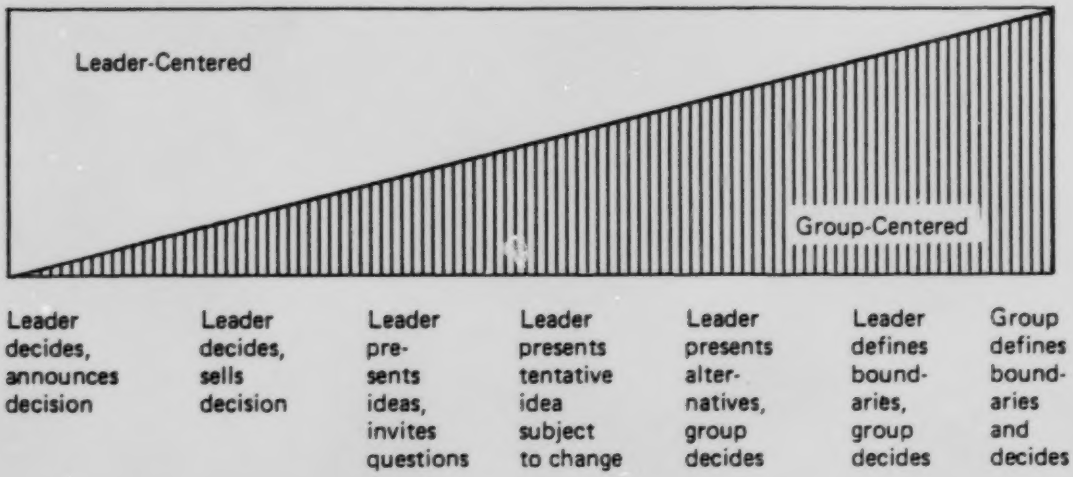
VISUAL III-1


Leader-Centered
Group-Centered
Leader decides, announces decision
Leader decides, sells decision
Leader presents ideas, invites questions
Leader presents tentative idea subject to change
Leader presents alternatives, group decides
Leader defines boundaries, group decides
Group defines boundaries and decides

Conditions	*Conditions*
a. Time factor and urgency of decision	a. No time pressure
b. Emergency	b. No emergency
c. Individual knowledge	c. Group knowledge
d. Lack of group skills	d. Group skills
e. Expectation of leader's role	e. Expectation of the group role
f. Legal responsibility	f. Freedom of responsibility

Reprinted with permission from: Napier, Rodney W. and Matti K. Gershenfeld, *Groups: Theory and Experience.* Houghton Mifflin Co., Boston, 1973, p. 161.

VISUAL III-2: LEADERSHIP CONTINUUMS

Laissez-Faire ←————→ Authoritarian

Nondirective ←————→ Directive

Facilitative ←————→ Running the dog and pony show
(Leadership spread through entire group)

Democratic
Egalitarian ←————→ Totalitarian

Aid members in accomplishing goals ←give up→ Responsibility; Decision-making control ←take on→ Direct how goals are reached

MODULE IV: CULTURAL CONSIDERATIONS IN TRAINING

RATIONALE

In using a training package, the trainer must consider the characteristics of the population, as well as the goals of the training. Important trainee characteristics include: learning styles, needs, interests, aptitudes, achievements, educational levels, job responsibilities, knowledge, motivation, and language. Trainees will differ along these dimensions; a significant factor influencing the expression of these differences will be their respective cultural and ethnic backgrounds.

Cultural influences may shape learners' behavior in the training setting, especially in the areas of communication processes and small group dynamics. Techniques, methods, and media may need to be modified according to the ethnicity of the specific training population, as well as for other educational reasons. Cultural differences between the trainer(s) and trainees, or even among trainees themselves, may impact learning.

This module will focus on cultural considerations in training. It is important to remember, however, that the information contained in this module is designed to increase participants' awareness of cultural differences and their potential impact on learning in small groups, and it is not intended as a primer for understanding and predicting the behavior of any specific ethnic group. Trainees should be cautioned not to stereotype ethnic group members.*

SYNOPSIS

The module begins with a brief introduction and review of the goals and objectives (10 minutes). The first activity is a structured exercise in which, first, trainees individually complete a worksheet describing characteristics of their own or a familiar cultural group, and then convene in triads to share and discuss their respective cultures. This experience prepares them to explore the idea that cultural differences among trainees may impact on behavior in the learning group. Trainees then reconvene, and the exercise is processed (95 minutes). A 15-minute break follows.

A 45-minute lecture or guided group discussion on the impact of cultural differences on learning in small groups is then delivered by the trainer.

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*Our primary concern here is the five ethnic groups often referred to as racial "minorities" (i.e., Asian/Pacific Islanders, blacks, Chicanos, American Indians, and Puerto Ricans), each of which has a distinct and identifiable cultural heritage. Culture and ethnicity, though analytically distinct, are closely related. Indeed, culture is frequently interpreted through ethnicity. The terms will be used synonymously here. This usage should not be interpreted as defining white American (Anglos) as lacking a cultural heritage, but is employed to distinguish nonwhite Americans from those of western European descent. It is felt that such a distinction in backgrounds is an important descriptor.

A small group structured exercise on adapting a training design follows. Participants will be grouped according to designated cultural groups. They will be directed to read a sample training design that is printed in the Participant Manual, and then to modify the design according to the needs of their cultural group. After a break, small groups will report out to the large group, and the trainer will process the exercise (115 minutes).

Finally, the trainer will ask the group to brainstorm the implications of cultural adaptation for trainer behavior (10 minutes). The trainer then provides a summary of the module (10 minutes).

MODULE IV: CULTURAL CONSIDERATIONS IN TRAINING **TIME:** 5 HOURS 45 MINUTES

GOALS

- To increase trainees' awareness of cultural differences and their implications for training.

OBJECTIVES

At the end of this module, participants will be able to:

- Identify at least five of the following variables about their own or a familiar nondominant cultural group:
    - Values
    - Major problems/concerns
    - Positive and negative attributes
    - Stressful elements and culturally appropriate coping strategies
    - Sex role-linked behaviors
- Identify at least two aspects of the communication process and small group dynamics that may reflect cultural differences
- Identify at least two areas that may require adaptation according to the needs or characteristics of a specific cultural group in a sample training design.

MATERIALS

- Flip chart or newsprint
- Easel/tape
- Felt-tip markers
- Participant Manual

MODULE IV: CULTURAL CONSIDERATIONS IN TRAINING

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
10 MINUTES	1. MODULE OVERVIEW
	In this overview, you will outline the purpose of the session, stating its goals and objectives. The preceding rationale and synopsis will supply useful information.
	It is important to let participants know that there are no easy answers that enable understanding or prediction of the behavior of particular ethnic groups, that it is imperative to avoid stereotyped responses to cultural differences. This module does not purport to have the answers; rather, its aim is to sensitize participants to possibilities and issues.
80 MINUTES	2. EXERCISE IV-1: CIRCLE OF CULTURE
	The purpose of the Circle of Culture exercise is to:
	a) Experience your own cultural identity
	b) Increase awareness of other cultural groups
	c) Discover similarities and differences across cultures and relative to the dominant culture
	d) Reinforce awareness of influence of culture on behavior.
(35 MINUTES) Worksheet IV-1	● Direct trainees to the Circle of Culture worksheet (Worksheet IV-1), which should be completed by each trainee individually. The segments of the circle should be filled in with information on each trainee's cultural attributes, behaviors, values, etc.
	● Quickly review each of the areas, answering any trainee's questions.
	● Point out "major differences from dominant culture," outside of the circle, on which trainees should identify their respective cultures' differences from the dominant culture. They should be encouraged to be thoughtful about filling in the circle, but not to belabor the task.

MODULE IV: CULTURAL CONSIDERATIONS IN TRAINING

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
(45 MINUTES)	● Allow 30 minutes for trainees to complete circle. Triads ● After completing the circles, have trainees form triads with group members whose cultural heritage is different from their own to share and discuss: - Each cultural description - Differences/similarities among each - Influence of cultural heritage on individual trainees.
15 MINUTES	3. DISCUSSION: LARGE GROUP PROCESS ● Encourage trainees to report: - How they experienced the exercise - Similarities/differences among cultures - Knowledge gained. ● Point out that differences may also impact on learning in small groups; implications exist for the trainer, the trainee, and materials. NOTE: Trainers will be asked later in the module to consider adaptation for the five ethnic groups, so they should keep in mind the differences that have surfaced.
15 MINUTES	BREAK
45 MINUTES Selected Readings IV-1 through IV-3 Reference Sheet IV-1	4. DISCUSSION: CULTURAL DIFFERENCES NOTE: This content may be delivered either through a guided group discussion or as a lecture. See Selected Readings IV-1 through IV-3 for additional information. Also, Reference Sheet IV-1 contains a selected bibliography about cultural issues in training.

- Deliver a presentation that follows the structure below. The discussion format may be especially appropriate for a multicultural training group whose members can speak from the perspectives of their different cultural backgrounds. Trainers should seek appropriate examples from the group, or be able to offer accurate ones themselves.

In either case, key points to be covered include:

Definition/Concepts

- Culture..."ways of behavior or techniques of solving problems which, being more frequently and more closely approximated than other ways, can be said to have a high probability of use by individual members of society. Implied...is the fact that frequent use of certain behaviors and techniques, though shared across cultural lines, will characterize a particular culture." (From CFCP, Trainee Manual, pp. 111-113. Taken from Anthony Wallace, Culture and Personality, New York: Random House, 1961.)

- Factors which influence the impact of culture on an individual: cultural borrowing, cultural change, cultural survival strategies, cultural conflict, and culture shock.

- Culture = dynamic network--a sifting process of arranging and rearranging experiences, selecting appropriate and functional behaviors that provide congruence to the individual.

- Ethnicity
  - "The character, the spirit of culture... related to the underlying sentiment among individuals based on a sense of commonality of origin, beliefs, values, customs, or practices of a specific group of people.... (It) is primarily based on ancestry." (From CFCP, Trainee Manual.)
  - Relevant to behavior, but not deterministic of behavior, per se.

- Establishes a sense of belonging and identifies the reference group.

Culture is interpreted through ethnicity.

- Cultural differences

  Characteristic ways of behaving and problem-solving that distinguish identifiable groups of people from one another.

- World view

  A body of attitudes, values, perceptions, and norms which determine the boundaries of the self relative to others and to the environment; describes the origin of and guiding principles for behavior.

Key Points

Theories of learning and small group behavior have been standardized on Europeans or Americans of European descent, but are generalized to apply to members of all other ethnic and racial groups, without regard for cultural differences which may affect behavior. Traditionally, non-normative behavior observed among racial/ethnic minority group members has been labeled pathological or deviant. The goal of a "melting pot" culture, in which all groups are assimilated into one, has been the institutional response to cultural differences among Americans. A tool in this effort was promulgation of the myth that some groups--e.g., blacks--had no definable culture anyway.

Areas of Potential Differences--Communication Processes

- Verbal behavior

  a) English may be the secondary spoken language.

  b) Even trainees comfortable speaking English may have difficulty with written English. All materials, including resource articles, must be understandable to trainees.

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES

Greater reliance upon auditory rather than written materials may be required.

- Nonverbal behavior

  a) Nonverbal responses, both appropriate and inappropriate, have an emotional impact. It is easy to unwittingly offend someone of another culture if you are unaware of culturally appropriate nonverbal behavior.

  b) Dimensions of nonverbal communication that reflect cultural differences:

    - Kinesics: Body language
    - Proxemics: Use of interpersonal space
    - Chronemics: Timing of verbal exchanges during conversations
    - Oculesics: Eye contact or avoidance
    - Haptics: Touching during conversation
    - Others: Dress, smell, time, etc.

- Feedback

  The feedback rules given in TOT and other NDACTRD courses may present problems for some ethnic groups, for whom it is culturally inappropriate to be direct either in sharing one's own feelings or in commenting on another's behavior. Feelings may commonly be expressed as thoughts; the culture may accord little value to focusing on individual behavior except in relation to the group.

- Learning styles

  The world view of a culture influencing its members' styles of learning--e.g., European/American (dichotomous) vs. African/Afro (diunital).

a) Dichotomous

- Body functions distinct from mental functions
- Behavioral or phenomenological view of causation of behavior
- Rational vs. irrational aspects of man
- Person-to-object orientation
- Individually focused; competitive
- Reason for free choice are guiding principles.

b) Diunital

- Unity of opposites
- No separation of body functions
- Equal recognition and acceptance of the influence of both the cognitive and affective domains; the primacy of one over the other depends upon the situation
- Person-to-group orientation
- Group-focused; cooperative
- Authority is key principle.

- Discuss implications for:
  - Problem-solving approaches or styles
  - Preferred training methods, including media assessment techniques
  - Choice of abstract or concrete modes
  - Training environment--physical and psychological.

Area of Potential Differences--Small Group Dynamics

- Cross-cultural groups

  Relationships among members of different cultural groups within the training setting can often be seen as a microcosm of those relationships in the larger society. For ethnic/racial minority groups, those are often power relationships, and will continue to be perceived as such within the training setting. It is unlikely that group members will openly admit to having these perceptions, but group processes will reflect them. Behavior may include:

  - Subgrouping by cultural identity
  - Avoidance of conflict and lack of expression of differences
  - Excessive conflicts
  - Slow or impeded group development
  - Low risk-taking
  - Limited self-disclosure
  - Unwillingness to look at process issues.

The trainer may need to confront the training group if these behaviors interfere with learning.

- Unicultural groups

  Some of the same behaviors listed above may also occur in culturally homogeneous groups. In those instances, their existence may reflect cultural norms for group behavior. In most non-Western derived cultures, the individual has only limited importance relative to the group, so cooperation and a sense of the collective may predominate. Individual opinions, styles, and interests would be secondary to group concerns.

  Similarly, an orientation to task rather than interpersonal learning may be common, coupled with clear expectations regarding the authority role of the trainer relative to the number of roles.

- Role-related behavior

  Examples of role-related behavior that influence groups include:

  - Sex
  - Social status
  - Age.

  In both kinds of groups, for example, the influence of traditional sex roles may affect the level of style of participation of females, who may defer to males in the areas of leadership and extent of verbal behavior in the group.

  There may also be implications for trainer style and role in the area of traditional sex roles.

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115 MINUTES

5. EXERCISE IV-2: ADAPTING A TRAINING DESIGN

NOTE: This exercise, as designed, is most suitable for a multicultural training group, whose members can use themselves as potential learners in the exercise. The exercise is also useful, as written, for a relatively homogeneous training group composed of one ethnic/racial group, whose members could also utilize themselves as potential learners.

If, however, the training group is primarily composed of white participants, they will have to be instructed to adapt the exercise to a cultural group with which they are familiar, preferably one they can expect to train. Caution trainees against making assumptions about cultural groups that they have no way of verifying. One other alternative, for a relatively homogeneous white group, is to place one member of the various ethnic group members present into each small group. Although this individual can be used as a reality check, it is important that he or she not be viewed as an "expert on the race." Trainers should emphasize this caution.

It is less important that trainees actually develop an alternative design than that they recognize and discuss the kinds of considerations that might be taken into account when modifying a design.

(25 MINUTES)

Flipchart/Easel
Newsprint
Felt-tip Markers
Participant Manuals
Worksheet IV-2

Conducting the Exercise

- Divide trainees into groups of five, according to the cultural groups they will be representing (see trainer note given above.)
- Give each group newsprint and felt-tip markers.
- Instruct the groups to choose a recorder/ reporter.
- Have participants turn to Worksheet IV-2 in the Participant Manual, which describes the training design to be modified. Participants should read the worksheet prior to breaking into small groups.

(45 MINUTES)

Small Group Discussions

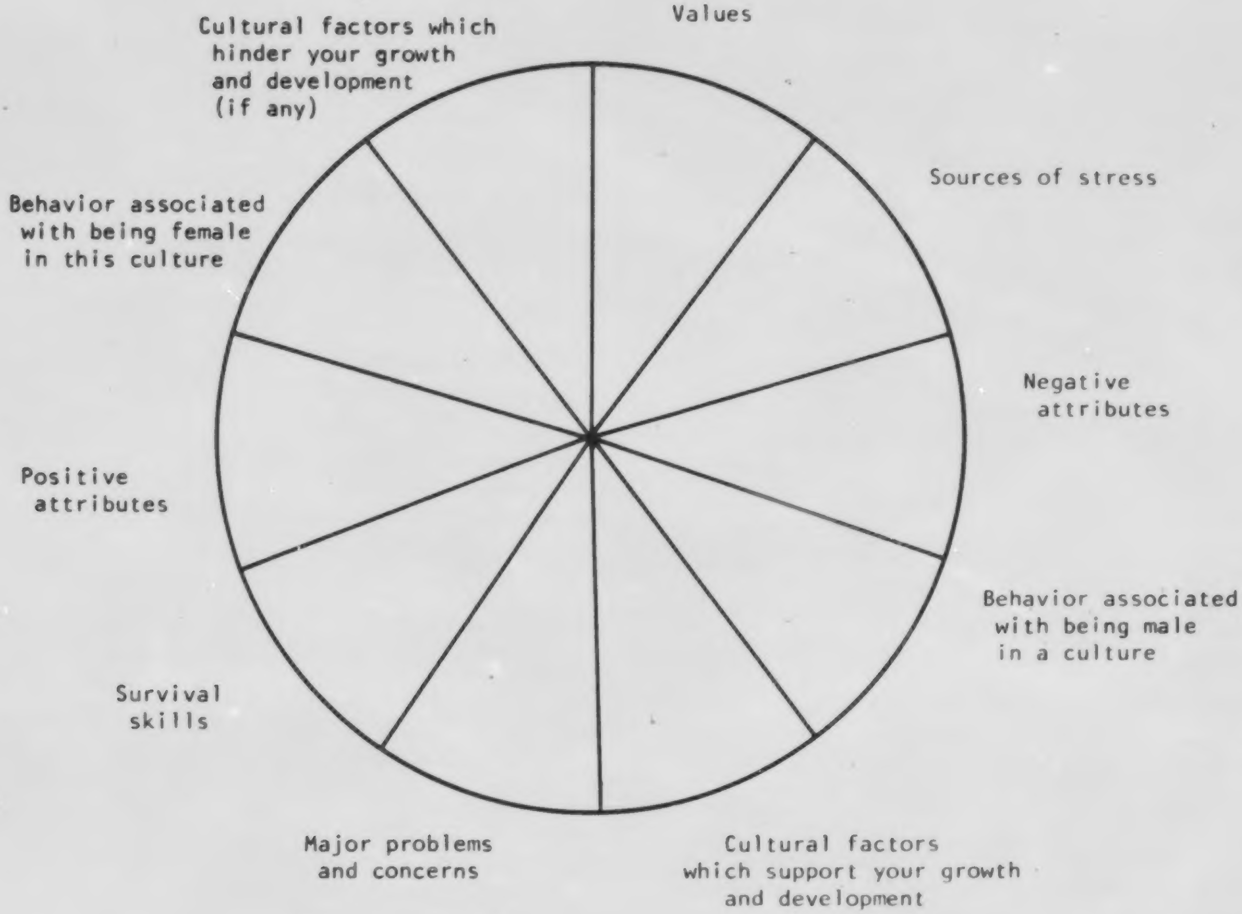
- Ask trainees to identify and record the following:
    - Ways in which they might adapt the design
    - A rationale for their modification, i.e., specific issues, concerns, or characteristics of that cultural group which would justify their adaptation
    - Recommendations for the trainer.
- Instruct trainees to approach the exercise from the perspective of the learner, so that they depend upon their own experiences as members of that cultural group, or as persons familiar with it, in order to identify specific concerns.
- During this period, float among the groups to provide assistance, if needed.

MODULE IV: CULTURAL CONSIDERATIONS IN TRAINING

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
15 MINUTES	BREAK
30 MINUTES	REPORT OUT TO THE LARGE GROUP To aid in processing the new discussion: • Allow each group no more than 5 minutes for reporting on its modifications. The reporter should also be encouraged to relate any difficulties the group experienced in doing the exercise. • Identify areas of similarity and difference in the ways the small groups adapted for each cultural group, and relate the outcomes to the lecture material.
10 MINUTES Flipchart/Easel Newsprint Felt-tip Markers	6. EXERCISE IV-3: BRAINSTORM ACTIVITY--TRAINER BEHAVIOR Ask the group how cultural adaptation might impact on trainer behavior after the small group exercise. What additional knowledge or skills might a trainer need to successfully make cultural adaptations? What values or attitudes would be important? How might this growth be developed? The group's responses should be recorded on newsprint.
10 MINUTES	7. MODULE OUTCOMES • Pull together the content of the lecture, the small group designs, and the brainstorm list to summarize the module. • Direct participants to resources--identified or printed--in their manuals for further information.
	END OF MODULE IV

WORKSHEET IV-1: CIRCLE OF CULTURE

____
Cultural Identity


Values
Sources of stress
Negative attributes
Behavior associated with being male in a culture
Cultural factors which support your growth and development
Major problems and concerns
Survival skills
Positive attributes
Behavior associated with being female in this culture
Cultural factors which hinder your growth and development (if any)

MAJOR DIFFERENCES FROM DOMINANT CULTURE:

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____

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WORKSHEET IV-2
ADAPTING A TRAINING DESIGN

You are to deliver a 5-day course called "Family Counseling for Substance Abusers," which is to be adapted for your designated cultural group. The course outline is as follows:

Pretest

Module I. Introduction and Overview
II. Family Systems Theory
III. Life Cycles
IV. Role of Family Therapist
V.A. Roles, Rules, and Self-Worth
V.B. Family Communication Patterns
VI. Characteristics of Families with Substance Abuse Problems
VII. Adolescents and Substance Abuse
VIII. Counseling the Spouse of the Abuser
IX. Significant Others
X. Marital Counseling and Family Sexuality
XI. Problem-Solving Skills
XII. Assessment Interviewing and Treatment Planning
XIII. Families with Special Concerns

Evaluation and Posttest

Read the following excerpt from Module V-B, How Familes Operate, which was taken from "Conjoint Family Counseling from Substance Abuse Counselors" (developed by the Family Counseling Center, Columbia, Missouri).

After reading the excerpt, break into small groups to discuss ways to adapt the material to a designated cultural group. Be sure to include a rationale for the adaptation(s) based on the issues, concerns, or characteristics you identify with that cultural group.

MODULE V-B: Trainer Manual*
HOW FAMILIES OPERATE:
FAMILY COMMUNICATION PATTERNS

The Trainer's Goal for This Module Is:

To acquaint the participants with the dysfunctional patterns of communication existing in families.

The Trainer's Objectives for This Module Are:

1. Define the importance of rules in a family.

2. Describe how a person's self develops concurrently with his/her relationships with others.

3. Explain and demonstrate the roles family members play as a result of low self-esteem.

Materials Needed for This Module Are:

- Lecture
- Newsprint with good communication rules
- Feedback rules
- Family handout

Suggested Time Schedule:

Activity 1:	10:30-11:00	Lecturette--Large Group
Activity II:	11:00-11:15	Practicing I's and Eyes in Dyads
Activity III:	11:15-12:00	Communication Triads--Small Group
Activity IV:	12:00-12:15	Body Talk

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ACTIVITY I

Lecturette

What makes a family nurturing or healthy as opposed to debilitating or troubled? One of the basic ingredients in a healthy family system is good communication. The individuals within the system feel comfortable in stating their needs, wants, desires, ideas, and feelings within the family structure. Some important rules operating within the family system governing communication include "It's O.K. to disagree." "It's O.K. to give feedback, both positive and negative." Listening and hearing is encouraged and individuals are treated with respect even when their behavior is not accepted. The communication of criticism and anger are allowable as long as they are directed at specific behavior and not at personhood. Trust and openness are high. This allows people to be themselves and at the same time be close to other family members.

All family units have some kind of communication: The verbals and non-verbals pass like electricity among the people within the family. The troubled family slowly develops its own unique patterns of communication. Communication patterns tend to be vague, closed, and indirect. Responses to other family members often contain elements of blame, fear, and avoidance, and are lacking in trust, openness, and confidence.

The messages are implied, judgements are pronounced, and there is poor emotional management, with individuals handling emotions by minimizing or denying their feelings or exploding inappropriately. There is a general lack of ideas, and creative thinking is discouraged because it is assumed that changes could not be tolerated. Non-verbals do not always match with verbals and result in double messages which at best are confusing and unclear.

The troubled family runs as smoothly as a ticking time bomb ready to explode with the next crisis.

Clearing communication patterns must be dealt with early in therapy. The therapist can begin to teach family members simple communication rules, such as:

1. Use the "I" statement when stating what you think, how your feel, or what you want. This encourages people to take responsibility for themselves within the family structure and also decreases the general blaming statements.

2. Use eye contact when talking to other family members.

3. Don't yell from another room: Face the person to whom you are talking. Many times, Dad in the living room yells about finances to Mom in the kitchen.

4. Practice listening. See if you can be another person's mirror and reflect back what you heard him say without editorializing.

5. Ask clarifying questions when you don't understand another person's point of view. This includes newspaper questions such as "What do you mean..." "Where..." "When..." or "How..." not "Whys." Why tends to make them react defensively.

. Try to understand how the other person is feeling. Pay attention to voice intonation and non-verbals.

7. Learn to give feedback. Make it specific and aimed at behavior the person can do something about. Feedback can be given on how you are affected by the person's behavior and should be checked to insure clear communication.

8. Learn to compliment other family members sincerely.

All of these rules contribute to healthy communication patterns within the family system and can be conveyed by therapist teaching, modeling, and giving examples, and then the family members role playing and practicing within the counseling session, with a commitment to continue the practice at home.

An important area to take a look at is how the family is communicating emotionally. How do they communicate their feelings to each other? What feelings do they allow themselves and other family members to have? Do the family rules allow people to express their feelings? (Trainer gives specific example.) How do the role expectations affect the expression of feelings within the family? (Trainer gives example.) As therapy progresses, the therapist can start labeling the self-defeating rules which inhibit communication patterns as myths and explore alternative rules within the family.

ACTIVITY II

"I's and Eyes"

Request the groups to divide into dyads. Have them sit facing their partner maintaining eye contact. Have the trainees talk with one another beginning each sentence with "I think," "I feel," or "I want." Allow about 3-5 minutes for this.

Next allow about 3-5 minutes for them to share with their partner how it feels to talk starting each sentence with "I."

ACTIVITY III

Communication Triads

Before beginning this exercise, take 5 minutes to review the following aspects of communication with the trainees....

LISTENING RESPONSES

Blocking Responses
  - Unrelated, off the wall
  - Tangential

Furthering Responses
  - Newspaper questions (where, what, when, how)

SOME COMMON BLOCKS TO LISTENING

- Jumping to conclusions
- Making assumptions
- Unspoken bargains
- Preparing your own reply
- Worried about what to say
- Association with past
- Defense mechanisms

Worksheet IV-2, Continued

- Emphatic (feeling responses)
- Mirroring--focusing on speaker and reflecting what you hear him/her say.
- Boring topic
- Physical condition.

RULES FOR EFFECTIVE COMMUNICATION

1. Deliberately using the word "I."
2. Expressing thoughts, feelings, ideas, directly and honestly.
3. Eye contact.
4. Firm, strong voice.
5. Fluency of speech.
6. Appropriate facial expression.
7. Relaxed body expression.
8. Appropriate distance from other person.

RULES FOR EFFECTIVE FEEDBACK

Purposes

- To check out assumptions
- To share observations
- To share how I am affected by you.

Good Feedback Is

- Descriptive, not evaluative
- Specific, not general
- Sensitive to both receiver and giver
- Directed toward behavior receiver can do something about
- Solicited, not imposed
- Well-timed
- Checked to insure clear communication.

Now request that your trainees find two new partners and form triads. One person is to act in the role of speaker, another person is to be in the role of some significant other in the speaker's life (such as friend, spouse, teacher). The speaker is to share with this significant other something that has been bothering him or her that he or she has not shared previously. The third person is to act as an observer to give feedback to both speaker and listener.

Allow approximately 5 minutes for the speaker to share what has been bothering him or her. Encourage the speaker to use positive speaking techniques and the listener to utilize furthering responses. After the speaker has finished, have the observer give feedback to each of the partners. Then have them switch roles until each person has had an opportunity to play each role.

ACTIVITY IV

Body Talk

...have the participants focus on body languages for a couple of minutes. Request all trainees to silently mill around the room simply looking at one another. Ask them to stop and silently choose someone in their immediate vicinity as a partner. Instruct them to communicate one message to that other person by using only body language....

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MODULE V

MODULE V: COURSE DELIVERY: METHODS AND MEDIA

ATIONALE

It is difficult to separate delivery from facilitation--there are certainly some shared skills between them. Delivery is defined here as the multitude of ways a trainer gets across content, reinforces it, or tests it. Delivery methods may be lecture, experiential exercise, or guided discussion. Some methods depend heavily on the trainer; some do not. Another dimension of delivery is the creative use of media and a technical expertise with training aids.

Facilitation skills enable a trainer to assist group members in reaching individual and group learning goals. Facilitation involves communication skills, processing skills, and intervention skills--three major areas through which a trainer tries to bring about the maximum amount of cognitive, affective, and skill learning.

This module covers course delivery through discussion of:

- Methods
- Media for training aids.

A method can be defined as a basic approach to instruction. Some examples are a lecture, site visit, programmed instruction, or small group discussion.

Media is any means of conveying an instructional message through a channel of communication (for example, television, videotape, printed test, graphics) that is used to facilitate learning. A training aid is the means by which information and ideas are nveyed to participants by appealing to their senses of sound, sight, and touch, such as flip charts and overhead projectors. The definitions of media and training aid overlap. (If there is a distinction, it is that "media" often includes the abstract idea of method, whereas "training aid" is merely the concrete machine or tool into or onto which information is placed.)

Matching adult learning theory and education techniques with the issue of delivery skills raises the following questions:

- To what degree must training parallel or stimulate working conditions to be effective?
- What methods or media are most effective for meeting cognitive learning tasks? Affective learning tasks? Psychomotor (skill) tasks?
- Why vary media?
- Are special training aids justified?
- Does the value of the course and/or the amount of behavior change justify the cost of media?
- What methods or media are inappropriate for use with particular ethnic, minority, or other groups?

Some answers to these questions will be found in this module; other answers will be found through participant discussions. While the intent of this module is not specifically to enable participants to design and develop learning segments for a total course (or even to develop isolated segments), it should enable adaptation of existing materials. For example, if a particular segment does not meet its learning task or is inappropriate for a particular audience, either for cultural or other reasons, the trainer will have ideas about alternate methods and media that he or she can substitute.

SYNOPSIS

The trainer will introduce the module and give an overview of the activities and reasons for them (10 minutes). This will be followed by a group "straw pole" as to individual participant's experiences with particular methodologies and their feelings about them (20 minutes).

A brief lecture will follow that links up choices of methodology with what was learned in Module I about adult education. Dale's Cone of Learning Domains will be touched upon briefly in terms of how each informs choice of methodology and, therefore, of training design.

After a break, 90 minutes will be devoted to individual and/or group demonstrations of various methodologies.

The final activity is a group-guided discussion that enables trainees to pull together principles of adult learning and group theory with objectives and choice of methodologies (30 minutes).

This is followed by a summary of learning outcomes and a critique of the trainer, methodology, and activities.

MODULE V: COURSE DELIVERY: METHODS AND MEDIA TIME: 3 HOURS

GOALS

- To make the design connection between course objectives, training tasks, and method/media choice
- To provide familiarity with a wide group of media choices
- To give participants an armamentarium from which to redesign segments of a course package in order to make the learning activity more relevant to a particular trainee population.

OBJECTIVES

At the end of this module, participants will be able to:

- List at least two methods that effectively correspond to each of the learning domains
- Describe three considerations for media/method choice (objectives, pacing, and audience)
- State which methods (and their related domain) are most often well received by adult learners and why
- State those methods they are familiar with, and list those in which they want to gain experience.

MATERIALS

- Flip chart or newsprint
- Easel/tape
- Felt-tip markers
- Participant Manual

10 MINUTES

1. MODULE OVERVIEW

- Introduce the subject matter to be covered and activities relating to the module objectives. You may want to refer participants to the list of goals and objectives in Module V of the Participant Manual.

Since this is the first of three modules to deal specifically with skill delivery and facilitation, the distinction between the two should be made. Trainer might also preview the major facilitative skills of processing and intervention, which will be covered in the next two modules.

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20 MINUTES

2. DISCUSSION: STRAW POLE

The purpose of this segment is to establish methods and media with which participants are already familiar. It will not only establish a baseline for determining favored delivery methods and preparation time needed, but it will also facilitate knowledge sharing and provide you with information that will give you more time to present the new material, rather than review in depth material that the trainees already know.

NOTE: If items such as audiovisual equipment are available and someone is present who can teach how to operate them, such media should be in the training room and worked into the lecture presentation you will be giving in the section below.

Reference Sheet V-1

- Point out the information and checklists on preparation found in the Participant Manual, Reference Sheet V-1.

- Share the rationale for this discussion with participants. It is:
  - To provide a sharing of information
  - To lay a ground work that encourages trying out new media and methods

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	- To anticipate avoidable problems that can occur with the use of particular methods and media. ● Facilitate a discussion that focuses on each participant's experience with training methods and media and the kinds of preparation engaged in before a training event ● Elicit responses to the following: - Favored methods and media--Which are fun? Which are a chore to use? - Very positive experiences with a particular method - Extremely negative experiences or "flops" - A sense of media (training aids) available to participants in the field - Preparation for use of methods and media.
30 MINUTES	3. LECTURE: FROM OBJECTIVES TO CHOICE OF METHODS AND MEDIA Selecting the media that is best able to bring about the achievement of learning objectives is a major part of the process of training design and development of training. There are many choices available; however, participant requirements must be balanced against what is reasonable in terms of the agency sponsoring the training. Although there are few definitive guidelines available that specify which method will guarantee reaching a particular objective, it is possible to develop some general guidelines. a. Discussion of objectives and learning tasks as related to method choice. Give at least two examples of how to derive learning tasks from objectives. - Learning tasks form the bridge between behavioral objectives and the training

design (also called lesson plan, training plan, trainer activities outline, time-content sheet, etc.). They are the arrangement of training methods into a detailed plan for a training session. Learning tasks specify what the trainees must learn in order to achieve the behavioral objectives.

- Beginning trainers sometimes ask, "Is it more appropriate to use role playing or buzz groups in this particular session?" This query must always be answered with another query: "What are you trying to accomplish in this session?" Form follows function. It is impossible to specify the value of any particular training method without reference to the training purposes involved.

b. General information that gives clues as to choice of method/medium:

Reference Sheet I-1

- Review learning domains, Dale's Cone, and the implications of each method/medium choice (see Reference Sheet I-1 in the Participant Manual).

c. Other considerations

- Trainee group characteristics, e.g.,
  - Cultural
  - Mix between professional, paraprofessional, and part-time staff
  - Educational levels
  - Prerequisite knowledge
- Pacing and variation
- Stage of group development--trust, cooperativeness, etc.

MODULE V: COURSE DELIVERY: METHODS AND MEDIA

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
Selected Readings V-1 and V-2 Reference Sheets V-2, V-3, and V-4	• Develop a lecture covering the content below. Selected Readings V-1 and V-2 and Reference Sheets V-2 and V-3, found in the Participant Manual, supply additional information. (Also, Reference Sheet V-4 lists selected references for using media.) • Let participants know that there will be time for questions and a discussion immediately following the next activity.
5-10 MINUTES	BREAK
10 MINUTES Flip Chart/Easel Newsprint Felt-tip Markers	4. EXERCISE: METHODS CLASSIFICATION • Place three newsprint sheets on easels or wall. They are entitled: COGNITIVE, AFFECTIVE, and PSYCHOMOTOR. Ask participants to brainstorm which methods or media most appropriately belongs with each learning domain.
Worksheet V-1	• Refer participants to Worksheet V-1 in their manual for instructions. • Allow 10 minutes for the activity. • Allow time for comments and questions on the lecture and exercise.
5-10 MINUTES	BREAK
90 MINUTES	5. GROUP DESIGN/INDIVIDUAL PRESENTATIONS: TRYING OUT A NEW METHOD In this activity, participants in small groups will have an opportunity to design a brief presentation, preferably using a method that is new to them. They will then choose one member of the group to deliver the learning presentation, as designed, to the large group. The large group should be broken into two smaller participant groups. Trainers should float between the groups. Trainers help each small group choose a segment of the TOT course, examine it, and, if necessary, modify some aspect of it. If

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
Worksheet V-1	needed, trainer should offer further assistance. Instructions can be found on Worksheet V-1. ● Ask participants to develop a design statement and choose a method, and, if appropriate, media that will enable them to reach the learning objective. A method that they are relatively unfamiliar with should be chosen. ● Let participants know that although not everyone will get to deliver a learning presentation in this exercise, everyone will have an opportunity to practice delivery and facilitative skills in a later module. ● Careful attention to processing how it felt to try something new should be accomplished within the large group: after each presentation, encourage small group members to state why a particular method was chosen after all the presentations are completed. ● Ask for general comments and questions after all presentations have been completed. Some specific questions that can stimulate discussion are: - Which was a particularly innovative or inventive presentation? - Which presentation was very effective? - Which presentation was most traditional?
10 MINUTES	6. MODULE OUTCOMES ● Close module by facilitating: - A review of module content and a discussion of the extent to which goals and objectives were met. (Goals and objectives can be found in Module V of the Participant Manual). - A brief discussion of the module as a model: methods and media used, trainer style and skills, etc.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	END OF MODULE V

WORKSHEET V-1
SMALL GROUP EXERCISE

PURPOSE:

To expose participants to methods and media with which they may not be familiar.

To give participants an opportunity to design or redesign a segment of a course.

To give a few participants an opportunity to practice delivery skills.

MATERIALS:

Newsprint
Felt-tip Markers

PROCEDURE:

1. As a group, imagine that you are delivering TOT. Pick a 15-to 20-minute segment or learning activity from any part of Modules I through IV.

2. As a group, chose an alternative way of presenting the material in that section. You might redefine the audience or the objectives, for example.

3. As a group, choose a method(s) and, where appropriate, media that would meet the objectives for the portion of the course you are about to plan.

4. As a group, outline what will be presented to and/or dealt with experientially with trainers. That is, outline or write down instructions.

5. Choose one or two participants to deliver the learning piece and help him or her to practice.

   Prepare any explanatory statements that group members might want to make to the large group after the presentation.

6. Reconvene in the large group and follow trainer instructions for delivery.

TIME:

30 minutes for small group activity
40 minutes for delivery of material
20 minutes for discussion
90 minutes total

REFERENCE SHEET V-1
USE OF AUDIOVISUAL MEDIA*

The expert use of transparencies, filmstrips, and other audiovisual media contributes immeasurably to any training event. Attention is focused on key issues, major principles are highlighted, and difficult concepts are expertly presented. Careful integration of audiovisual materials with the content will quicken the pace of the presentation and enliven the training event. On the other hand, audiovisual materials can seriously disrupt a presentation if the trainer is inept in the use of the equipment. Fumbling with transparencies that are out of sequence, searching for an extension cord, fiddling with the projector, or having a filmstrip out of synchronization with the sound track are problems that inevitably will plague the ill-prepared trainer. As a result, the pace of the session lags and the group's interest wanes.

The equipment is basically simple to operate. With careful set up and a brief practice period before the start of a session, it will function smoothly and fit into the presentation without a break in the continuity. The following sections explain the operation of the audiovisual equipment needed for presentation of these training materials and give tips on effective use.

Flipcharts - Flipchart paper and tripods (see Figure 1) may be purchased at art stores, office supply stores, or university bookstores. The local school may also be able to provide or tell you where to obtain such equipment. If standard tripods and flipchart paper are not available, they may be improvised using large sheets of newsprint (at least 27 x 34 inches) of the type used for painting in kindergarten. The newsprint can be taped to the wall or to a movable chalkboard.

The advantages of flipcharts are that they require no technical knowledge to operate and they can be displayed in the training area for continuous reference throughout a session. Two important things to remember about using flipcharts are: 1) write large and legibly, and 2) keep the information presented brief, using key words or short phrases rather than complete sentences.

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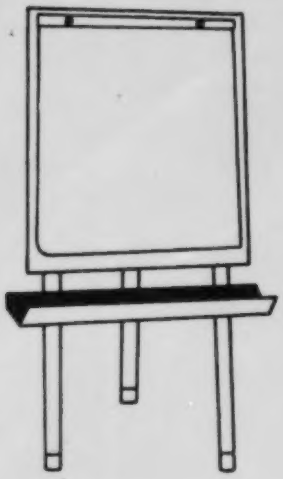
* Taken from National Council on Alcohol Education's courses.

Masking tape is recommended for attaching flipchart paper to walls as the paint or plaster is less likely to be removed when the tape is pulled off.

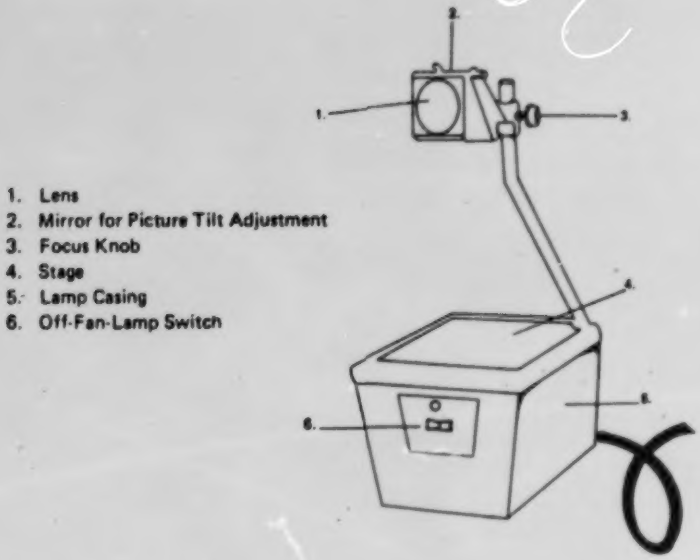
Figure 1. Flipchart and tripod



The Overhead Projector - The overhead projector (see Figure 2) enlarges images printed on transparent acetate sheets and projects them on a screen. It is used with the trainer facing the group so that eye contact with the participants can be maintained. Since the room does not have to be darkened to use an overhead projector, the logistics are simplified.

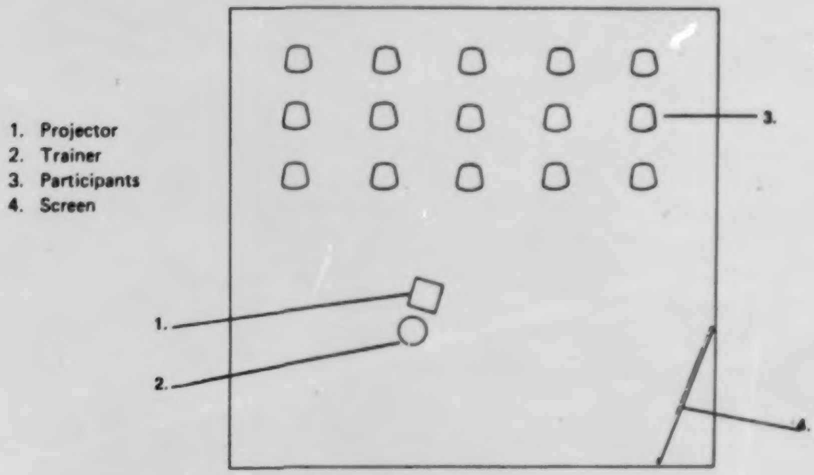
Overhead transparencies are not necessary to this training program. However, a trainer who has access to an overhead projector and screen and who feels comfortable using this type of audiovisual equipment may choose to convert some of the information presented on flipcharts to transparencies for an overhead projector.

Figure 2. Overhead projector



To operate, set up the projector and screen as illustrated in Figure 3.

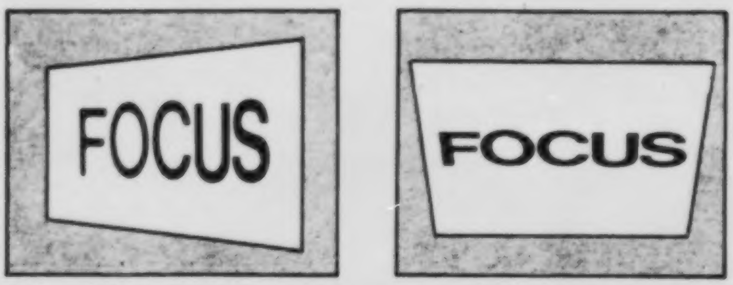
Figure 3. Proper placement of overhead projector



Place a transparency on the stage so that you can read it as you face the group. Turn on the light, and focus by turning the knob. Tilting the head of the machine with the tilt knob raises or lowers the beam of light.

The distance from the screen determines the size of the image area. Adjust it until the light fills the screen evenly and no dark edges are showing. If the image is distorted by the "keystone effect" (see Figure 4), correct by changing the position of the projector.

Figure 4. Keystone effect



Projector too far left

Projector too low

The overhead projector should only be left on when you want attention directed to the screen. Switching the projector off between visuals offers an opportunity to pinpoint attention on the screen each time a new visual is shown. When left on, it is a distraction that interferes with the presentation and group interaction. The overhead projector can be used as a chalkboard by placing a clear sheet of acetate on the stage and writing on it with a water-soluble, felt-tip pen or grease pencil. The acetate can be reused; just wipe off the pen or pencil marks.

When operating the overhead projector, remember these precautions:

- Turn the lamp to "Off" when changing transparencies.
- Always allow fan to run after turning off lamp to prevent heat buildup in the projector housing.
- Never move the projector when the lamp is hot. Hot filaments break easily.
- Always turn the lamp off and unplug projector when changing lamps. Both lamp and surrounding metal will be hot.
- Never handle a new lamp directly; use a piece of paper or handkerchief.
- Keep the projection stage clean.
- Clean lens as necessary.

Transparencies for use on the overhead projector can be made by a number of different methods, which range from simply writing information on a clear acetate sheet to using expensive multicolor heat or chemical transfer processes. The common types of photocopying equipment available in most offices easily convert printed or typed materials, line drawings, or premade transparency masters into transparency form. Acetate sheets are inserted in these machines according to manufacturer's directions and the master is reproduced in black and white on these sheets. The transparencies can be used unmounted or else framed in a cardboard holder (ordered from the local art or office supply stores) for ease of handling and storage. If an arrangement can be made with the audiovisual center in a local school, the diazo or heat process can be used to add color to the visuals. If such an arrangement can be made, the center staff will advise about which process is most effective and assist in use of the equipment. Having transparencies commercially reproduced is often prohibitively expensive, and therefore is not recommended.

REFERENCE SHEET V-2
SELECTING CURRICULUM CONTENT
by P.L. Lowery

It goes without saying that the content a trainer selects or creates must be harmonious with the learning objectives that have been established for the training. That is easy. What is not so easy is finding the right blend of art and science so that what the trainer puts together does what he wants it to do in the way that he wants it done. A piece from the New England Journal of Medicine discussing the possible teratogenic effects of hallucinogens may provide the necessary information, but the chances are good that many participants won't know what teratogenic means, never mind what kind of effects they may be. Perhaps a better source, depending on the audience, might be an article from a more popular magazine such as Psychology Today that discusses whether or not the use of hallucinogens produces birth defects. Or the trainer might have to pull together information from many sources and create his own resource piece.

A more difficult problem in selecting content is deciding how much information the audience needs in order to meet the learning objectives and be more effective in their work. Because the field of drug abuse is so diverse and complicated, it is sometimes tempting to try to give trainees a quick dash through everything that has been written. Not only is that impossible, some of the information may not be consistent with the points training should be trying to make. For example, if the goal is to train a group of community volunteers to handle a hotline, the trainer would probably want to stress the differing characteristics among drug abusers instead of overloading trainees with research that points out the common features of drug abusers' formative years or the similarities on personality inventories. That is not to say that such information isn't valid or that it should be discounted; it is to say that the goal is to help volunteers learn to respond to each caller as personally and sensitively as possible, to treat each caller as a special case. It's not likely that volunteers who have been told repeatedly that 98% of all drug abusers come from disrupted homes will pay as much attention to the fact that a caller may be failing in school, in a bad love affair, or frightened to death by drug-related symptoms. What the trainer must decide is how important each kind of information is to achieving the training goal.

REFERENCE SHEET V-3
LECTURE: DEVELOPING THE CURRICULUM

The first step in constructing a training program is to develop training goals and behavioral objectives. Next, the trainer needs to identify the curriculum: the appropriate content information, materials, and training aids. Curriculum is the planned course of study, involving trainee interaction with instructional content, resources, and processes for the purpose of attaining the behavioral objectives. Selecting or developing the curriculum is the second step in constructing the training program. Based on the behavioral objectives, the trainer researches information, reviews materials, and selects the specific content information that will be conveyed to participants during the training program.

Learning tasks form the bridge between behavioral objectives and the training design; they specify what the trainees must learn in order to achieve the behavioral objectives.

In the past, few designers of training have taken the time to specify learning tasks. Generally they determine a list of topics they think should be covered in the training session without thought about their relevance to the behavioral objectives. The process of deriving learning tasks forces the trainer to put himself in the position of a trainee and to consider each item that must be learned in order to accomplish the objectives. Specific learning tasks facilitate the process of selecting curriculum content because what has to be covered in the training session is delineated.

SELECTING THE CONTENT: DEVELOPING LEARNING TASKS

To select the content, the trainer must first ask himself: What must the trainees know to accomplish the behavioral objectives. What kinds of knowledge, attitudes, and skills must the trainee master to be able to demonstrate expected performance? What learning tasks will best impart this knowledge, shape these attitudes, or give practice in these skills? These learning tasks embrace whatever learning is to be undertaken by the trainee to enable him to accomplish the behavioral objectives.

Sometimes the learning task is almost the same as the performance specified in the behavioral objective, for example:

> At the end of the training, and without the aid of notes, the trainee will be able to identify at least three classifications of drugs subject to abuse.

The learning task, in this case, is to learn the names of the four classifications of drugs that are subject to abuse.

In most cases, however, many learning tasks are derived from one objective, for example:

At the end of the training, and without the aid of notes, the trainees will be able to identify at least four items of information obtained during an assessment interview that are used to determine client readiness for treatment.

The learning tasks, in this case, are:

1. To learn what an assessment interview is

2. To learn the categories of information to be obtained during an assessment interview

3. To learn the definition of and rationale for Category I of the assessment interview, Client Readiness

4. To learn what information is necessary to determine client readiness

To identify course content the trainer generates a list of learning tasks. This provides him with a focal point for selecting appropriate curriculum content.

In selecting content, the trainer should consider the specific characteristics of the leraning group and the individual differences among learners. The content selected has to be relevant to the trainees' abilities and aptitudes, their attention span and interests, needs, abilities to handle abstractness or concreteness, and their level and learning style.

ORGANIZING THE CONTENT

The sequence in which the content will be presented is determined to some extent by the notion of logical progression. It seems logical that one would not first discuss or practice the rudiments of scuba diving with a group of nonswimmers; they must swim before they can dive. Nor would a trainer jump from the first lesson in scuba diving to a lesson on various ways of identifying marine flora and fauna. A more likely progression would be from the rudiments of handling equipment to diving safety and underwater practice. Until the trainees can master the first step, they should not begin the second, and the third step requires a mastery of both step one and step two.

Another basis for determining the sequence of content is the type of learning represented by each task: a change in knowledge, attitude, or skills. For example, learning information about what the equipment is and how it should be used must precede skill-building practice on proper equipment use. Also, knowing that it is important to follow safety procedures does not necessarily guarantee that beginning scuba divers will have a "good" attitude toward safety. A demonstration in which the effects of carelessness are demonstrated might bring about the desired attitude. Both logical progression and the type of learning tasks involved should be taken into account when organizing and sequencing the curriculum content.

REFERENCE SHEET V-4
SELECTED REFERENCES FOR USING MEDIA

Anderson, R.H. Selecting and Developing Media for Instruction. New York: Van Nostrand Rheinhold Co., 1976.

Bretz, R.L. A Taxonomy of Communication Media. Englewood Cliffs, New Jersey: Educational Technology Publications, 1971.

Electro-Voice Microphone Primer. Buchanan, Michigan: Electro-Voice, Inc.

Egan, G. Encounter: Group Process for Interpersonal Growth. Wadsworth, 1970.

Grove, T. Experiences in Interpersonal Communication. Prentice-Hall, 1976.

Johnson, D.W., and Johnson, F.P. Joining Together. Prentice-Hall, 1975.

Johnson, D.W. Reaching Out: Interpersonal Effectiveness and Self-Actualization. Prentice-Hall, 1972.

Kemp, J.E. Instructional Design--A Plan for Unit and Course Development. California: Fearon Publishers, 1971.

Kemp, J.E. Planning and Producing Audiovisual Materials. San Francisco: Chandler, 1968.

Mattingly, G., and Smith, W. Introducing the Single Camera System. Washington, D.C.: S & M Productions Ltd., 1971.

Nylen, D., Mitchell, J.R., and Stout, A. Handbook of Staff Development and Human Relations Training. Washington, D.C.: National Training Laboratories/Institute for Applied Behavioral Sciences, 1967.

Pfieffer, J.W., and Jones, J.E. Annual Handbooks for Group Facilitators. University Associates Publishers, Inc., since 1972.

Pfieffer, J.W., and Jones, J.E. A Handbook of Structured Experiences for Human Relations Training, Vols. I, II, III, and IV. Iowa City: University Associates Press, 1970.

Simon, H., and Kirshenbaum. Values Clarification. Hart Publishers, 1972.

Weisgerber, R.A. Instructional Process and Media Innovation. Chicago: Rand McNally and Company, 1968.

OTHER RESOURCES

AV Communication Review. Washington, D.C.: The Association for Educational Communications and Technology. Articles concerned with the growing industry of educational technology.

Reference Sheet V-4, Continued

Audio Visual Instruction. Washington, D.C.: The Association for Educational Communications and Technology. Published ten times each year; articles generally are centered around the state-of-the-art in educational design and new equipment updates.

MODULE VI

MODULE VI: FACILITATION: PROCESSING LEARNING EXPERIENCES

RATIONALE

While a trainer may have good delivery skills, these skills comprise only half of the necessary skills in training. For learners to truly learn, they must not only receive information, but also practice it, discover how it relates to what they already know, and determine how it relates to what they need to know and how they feel about integrating it with what they already know. This is called processing.

Learning in a functioning group, of course, adds dimensions to the process beyond that of individuals learning in a traditional classroom setting. The group setting provides for sharing experiences and shared experience in the here-and-now. The group also provides opportunities to try out, play act, and learn a variety of roles. There are curative factors in a group that come out of the feedback and support provided by group members to each other that can help people go beyond past learning difficulties. The learning experience, as well as the didactic lesson, must be processed. Processing enables participants to draw from what they have experienced or learned.

SYNOPSIS

The overview of this module lays out communication skills, particularly those involved in giving feedback according to descriptive criteria. In addition, the overview discusses the rationale for meeting objectives and previews activities that lead to improved interaction.

The next section is optional; it involves diagnostic evaluation of whether the trainee group can provide useful feedback and, should there be deficiences, some optional exercises to provide practice in giving good feedback.

The first working section of this module is a lecture/brainstorm discussion of the EIAG process and guidelines for processing information and feelings. This is followed by small group examinations of learning gained through an experiential exercise; as a group, participants will process their learning and feelings about the learning.

Finally, several participants will make presentations or involve the group in an activity and then process the experience/learning. A summary of module outcomes ends the activities.

MODULE VI: FACILITATION: PROCESSING LEARNING EXPERIENCES

TIME: 3 HOURS 30 MINUTES

GOALS

- To understand what group experience has to offer individuals
- To understand communication that supports group and individual growth
- To understand what is needed beyond presenting information and facilitating experiential activities.

OBJECTIVES

At the end of this module, participants will be able to:

- Write four key questions or design an activity that will help a group in processing new information or new skills
- Define EIAG
- Define processing
- Deliver and process an experiential learning piece.

MATERIALS

- Flip chart or newsprint
- Easel/tape
- Felt-tip markers
- Overhead projector and transparencies (optional)
- Participant Manual

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
10 MINUTES	1. MODULE OVERVIEW

- Preview the contents of this module, giving the rationale and the activities that will move participants toward meeting module objectives. Use the list of goals and objectives that appears in Module VI of the Participant Manual.

NOTE: This module depends to some extent on prerequisite knowledge in the area of communication skills, particularly that of giving descriptive feedback.

The skill of giving feedback is taught in the Group Facilitators Training Package by NDACTRD and in Counseling Alcoholic Clients by the National Center for Alcohol Education (NCAE).

There are many other communication skills, as well, that are useful. Many of these skills might be grouped under the heading "microcounseling." Among them are:

- Listening
- Paraphrasing
- Probing
- Summarizing
- Reflecting Feelings.

If there are doubts as to whether participants have adequate feedback skills, one or more of the optional diagnostic or practice exercises in the next section may be useful.

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
10-40 MINUTES	2. EXERCISE VI-1: FEEDBACK

It is assumed that participants have adequate knowledge of and practice in giving feedback. However, if group members or the trainer feels that there is a major deficiency in this area, one or more of the following options may be elected. Material on communication and feedback is included in the Participant Manual. If the deficiency exists, but is not felt to be so major as to impede subsequent learning and practice experiences, suggest readings appropriate

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
Selected Readings VI-1 and VI-2 Reference Sheet VI-4	to group members. (See Selected Readings VI-1 and VI-2 and Reference Sheet VI-4, the bibliography for this module.)
	Exercise VI-1, Option A: Individual Diagnostic Exercise
(10-20 MINUTES) Reference Sheet VI-1	• Poll participants verbally about their sense of skill at giving feedback according to the criteria listed in Reference Sheet VI-1 of the Participant Manual,
	or
Worksheet VI-1	• Administer the Quiz on Types of Feedback, on Worksheet VI-1 in the Participant Manual.
(10 MINUTES)	Exercise VI-1, Option B: Lecture
	• Present a brief lecture on the principles of feedback.
(20 MINUTES)	Exercise VI-1, Option C
Worksheet VI-1, Option C	Whether or not the trainer reviews feedback, Worksheet VI-1, Option C, in the Participant Manual might be used to help participants sharpen their understanding of the distinction between objectivity and subjectivity, and to continue to weave in the subject of trainer ethics and power.
20 MINUTES	3. DISCUSSION: PROCESSING AND INTERVENTION
Reference Sheets VI-2 and VI-3 Selected Readings VI-3 and VI-4	• Help participants to discriminate between intervention and processing. (See Reference Sheets VI-2 and VI-3, and Selected Readings VI-3 and VI-4.) Point out that the difference between them is as follows: - Processing--What the group does to integrate content and feelings. - Intervention--What the trainer does to direct group process.

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
	As part of the lecture:
Visual VI-1	• Present the EIAG Model. Use Visual VI-1 as an aid. • Relate it to: - Didactic material - Experiential material - Incidental occurrences.
Visual VI-2	(Use Visual VI-2 to develop the idea of a continuum of content/feelings to be processed.)
Reference Sheet VI-1	• Present guidelines for processing. (See Reference Sheet VI-1.) • Also, bring out questions that participants need to answer for themselves, in order to take responsibility for what they have learned or for feelings about what they learned. Have them talk over these questions: - How does this relate to what I know? - How does this relate to what I need to know? - Is it relevant? - How will it change my perspective? - How will it change my behavior? - How will it change my attitude? • Discuss questions related to feelings about activities/interpersonal relationships: - Did it feel comfortable/uncomfortable? - Was the sharing beneficial? Was there conflict? Cooperation? - Did being in this small group have an effect on learning positively? Negatively? • Review questions that need to be answered after experiential exercises:

  - What were the skills' breakdowns?
  - What was my comfort level with skills?
  - What are the principles that can be generalized from this exercise?

Visual VI-1
Flip Chart/Easel
Newsprint
Felp-tip Markers

- By using Visual VI-1 of the EIAG model, deliver a step-by-step process for deriving interventions that help group members process their experiences.
- Expand the "Identity" step to at least three areas out of which questions that can be put to the group easily fall. For example, "What principles can you take out of the role play you just did?"

---

30 MINUTES

4. EXERCISE VI-1: CONDUCTING IT

- Use the following two activities in order to process the lecture just completed. The first involves processing didactic material; the second, processing an experiential exercise.

  a) To process didactic material, you might ask the group how they would process the lecture just delivered. Require each group member to try an intervention and have the group respond.

  b) To process an experiential exercise, you might ask the group: "How many of you know the exercise in which one person has to obtain 'it' from another?"

    - Can someone review it? What is the point?
    - How might you intervene to process it?

Directions for "It"

One member of a dyad is designated as having "it," and he or she does not want to give "it" up. The other person wants "it"; his or her job is to talk the first person into giving "it" up. It is important in

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
	this game that the person who has "it" does not think of "it" as a specific object. Five minutes are given to get "it" away from the partner. • Facilitate the group's processing of both the lecture and the "it" exercise. It might be useful to hold a brief group discussion of any differences and similarities between processing didactic and experiential methods.
5-10 MINUTES	BREAK
30 MINUTES	5. EXERCISE VI-2: PRACTICE IN PROCESSING In this section, an opportunity is given to participants to practice processing. Group supports are built into the exercise. Trainer(s) should move between the small groups, observing and offering assistance as needed.
Worksheet VI-2	• Direct participants to Worksheet VI-2 in their manuals. • Have participants form small groups of approximately four members each. • If, in circulating between small groups, anyone is stuck, encourage the "observers" to help out the "trainers," either by applying processing interventions to the trainer or by momentarily taking their place. • When the large group reconvenes, try to get a shared sense of participants' idea of the relevance of the practice just completed and of processing itself as a skill necessary to their work as trainers.
5-10 MINUTES	BREAK
60 MINUTES	6. EXERCISE VI-3: MORE PRACTICE IN PROCESSING In this last activity only two or possibly four participants can have an opportunity to present and process a learning experience. Presentations--whether

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	didactic or experiential--should take no more than 15 minutes. Another 15 minutes should be devoted to group processing of the experience.
	• Break large group into two small groups.
Worksheet VI-3	• Choose one (two, if time permits) presenters for each group. (Participants who delivered presentations during Module V should allow others a turn.) Presentations occur as an outline on Worksheet VI-3 of the Participant Manual.
	• Focus on questions and unfinished business when the large group reconvenes.
10 MINUTES	7. MODULE OUTCOMES
	• Summarize and process the module in terms of 1) meeting objectives; and 2) method, trainer, etc., as a model.
	NOTE: If the suggested training schedule has been followed, it is the end of Day 3. At this point, it would be good to have participants begin to make decisions about their own presentations which will occur on Day 5.
Module IX	You should next study Module IX in order to explain the options for presentations to participants.
	• Then, refer participants to Module IX of their manuals. Encourage participants to pick a topic and to begin to think about how to deliver and process a learning piece on that topic. Formal presentations will begin on Day 4 of the training.
	• Be available for assistance to participants individually. Also let them know that presentations will be discussed further at the close of Module VIII.
	END OF MODULE VI

WORKSHEET VI-1
QUIZ ON TYPES OF FEEDBACK

Directions:

1. Using the code in the box below, place the appropriate letter (or letters) in front of each item.

2. Check your answers with the key.

R (Reporting) = Giving the receiver factual data.
A (Assuming) = Telling what the facts mean to you.
L (Leveling) = Using "I" to tell the receiver how your assumptions made you feel without obligation to receiver to change.
C (Confronting) = Using "you" to communicate your judgment to the receiver.
G (Gross) = Giving the receiver unmanageable information.
D (Descriptive) = Same as Reporting.
E (Evaluative) = Making assumptions to tell a person what you think and expecting a behavior change.
P (Prescriptive) = Telling the receiver what to do or how to change.

Example:

__R,A__ You spoke rapidly; I'm guessing you had a lot to say in just a short time.

________ 1. Your lips moved rapidly; your words come out very fast.

________ 2. You've got to speak more slowly so people will understand you.

________ 3. I noticed you were late for each of the three sessions yesterday.

________ 4. I found myself getting annoyed because you've been late to three sessions in a row, now.

________ 5. Your accent is really seductive, you know.

________ 6. I saw people yawning and looking out the window; I guess they were bored.

________ 7. Your voice was loud and clear--I heard everything you said.

________ 8. I saw you smiling when I messed up my presentation.

________ 9. When you told that last joke no one laughed.

________ 10. You really cut her down when you ignored her question.

________ 11. There is something about you that just turns me off.

________ 12. Those freaky clothes you wear turn me off.

________ 13. Those freaky clothes you wear turn me on.

________ 14. You should make an effort to participate more.

Worksheet VI-1, Continued

ANSWER KEY

R,D 1. Factual data with no judgment or interpretation.

C 2. Judgment directed at the receiver.

R,D, 3. See 1, above.

L,R,E 4. Giving personal feelings and factual reasons for them.

G 5. What's the receiver to do with this kind of judgment?

R,A 6. Factual data followed by a personal assumption.

R 7. See 1, above.

R 8. See 1, above.

R 9. See 1, above.

C,E 10. Judging the other person's behavior on an assumption.

G 11. Your receiver has ESP, maybe?

C,E 12. Close to gross--who's to define "freaky?"

C,E 13. See 12.

C,P 14. Judgment and sentencing.

OPTION C

PURPOSE:

To give feedback that makes a distinction between observations and assumptions.

To further explore fantasies participants hold about trainers and training.

MATERIALS:

None

PROCEDURE:

1. Form dyads.
2. One participant makes observations, and on the basis of them, states assumptions as to how that person would be as a trainer.

   For example: "I see you are wearing a business suit. Everything is color coordinated. I imagine that you'd be a very competent, well-organized trainer."
3. The other participant does the same.

TIME:

20 minutes

WORKSHEET VI-2
PRACTICE IN PROCESSING
(FOR EXERCISE VI-2)

PURPOSE:

To process an experiential exercise in terms of its theoretical content and the feelings it generates in participants.

MATERIALS:

Descriptions of three exercises that can be used. (Small group "trainer" may substitute any appropriate exercise with which he or she is familiar.)

PROCEDURE:

1. Break into small groups of four.
2. One (or two) participant(s) are designated as "trainer" (or "trainer" and "cotrainer").
3. "Trainer(s)" sets a context for the exercise and gives necessary instructions.
4. Trainer(s) facilitates exercise.
5. All members of small group jot down notes with respect to the EIAG process (i.e., what were the important elements, what can be generalized).
6. "Trainer" makes interventions to help group process the experience. Group members may act as "alter egos" supplying additional interventions or building upon those made.
7. Reconvene in large group.

TIME:

30 minutes

WORKSHEET VI-3
INDIVIDUAL PRESENTATION(S) TO THE GROUP
(FOR EXERCISE VI-3)

PURPOSE:

To facilitate group in processing a learning piece presented by a participant.

MATERIALS:

Module V, Participant Manual

PROCEDURE:

1. Break large group into small groups of five or six participants.
2. Two participants within each small group volunteer or are chosen within each group.
3. These two prepare a 10-minute presentation on interventions for processing content and feeling generated by the presentation. They may choose from their own experience(s) or use a resource notebook to generate a presentation. (While they take 10 minutes to prepare, other group members may take a break).
4. In turn, each delivers and processes his or her presentation.

TIME:

60 minutes

REFERENCE SHEET VI-1
AIDS FOR GIVING AND RECEIVING FEEDBACK

by

George F.J. Lehner, Ph.D.

Unpublished paper, Psychology Department, University of California at Los Angeles.

AIDS FOR GIVING AND RECEIVING FEEDBACK

Some of the most important data we can receive from others (or give to others) consists of feedback related to our behavior. Such feedback can provide learning opportunities for each of us if we can use the reactions of others as a mirror for observing the consequences of our behavior. Such personal data feedback helps to make us more aware of *what* we do and *how* we do it, thus increasing our ability to modify and change our behavior and to become more effective in our interactions with others.

To help us develop and use the techniques of feedback for personal growth, it is necessary to understand certain characteristics of the process. The following is a brief outline of some factors which may assist us in making better use of feedback, both as the giver and the receiver of feedback. This list is only a starting point. You may wish to add further items to it.

1. Focus feedback on behavior rather than the person

It is important that we refer to what a person *does* rather than comment on what we imagine he *is*. This focus on behavior further implies that we use adverbs (which relate to actions) rather than adjectives (which relate to qualities) when referring to a person. Thus we might say a person "talked considerably in this meeting," rather than that this person "is a loudmouth." When we talk in terms of "personality traits" it implies inherited constant qualities difficult, if not impossible, to change. Focusing on *behavior* implies that it is something related to a specific situation that might be changed. It is less threatening to a person to hear comments on his behavior than his "traits."

2. Focus feedback on observations rather than inferences

Observations refer to what we can see or hear in the behavior of another person, while inferences refer to *interpretations* and conclusions which *we make* from what we see or hear. In a sense, inferences or *conclusions* about a person contaminate our observations, thus clouding the feedback for another person. When inferences or conclusions are shared and it may be valuable to have this data, it is important that they be so identified.

3. Focus feedback on description rather than judgment

The effort to describe represents a process for reporting what occurred, while judgment refers to an evaluation in terms of good or bad, right or wrong, nice or not nice. The judgments arise out of a personal frame of reference or values, whereas description represents *neutral* (as far as possible) reporting.

4. *Focus feedback on descriptions of behavior which are in terms of "more or less" rather than in terms of "either-or"*

The "more or less" terminology implies a continuum on which any behavior may fall, stressing quantity, which is objective and measurable, rather than quality, which is subjective and judgmental. Thus, participation of a person may *fall* on a continuum from low participation to *high* participation, rather than "good" or "bad" participation. Not to think in terms of "more or less" and the use of continua is to trap outselves into thinking in categories, which may then represent serious distortions of reality.

5. *Focus feedback on behavior related to a specific situation, preferably to the "here and now" rather than to behavior in the abstract, placing it in the "there and then"*

What you and I do is always tied in some way to time and place, and we increase our understanding of behavior by keeping it tied to time and place. Feedback is generally more meaningful if given as soon as appropriate after the observation or reactions occur, thus keeping it concrete and relatively free of distortions that come with the lapse of time.

6. *Focus feedback on the sharing of ideas and information rather than on giving advice*

By sharing ideas and information we leave the person free to decide for himself, in the light of his own goals in a particular situation at a partiular time, how to *use* the ideas and the information. When we give advice we tell him what to do with the information, and in that sense we take away his freedom to determine for himself what is *for him* the most appropriate course of action.

7. *Focus feedback on exploration of alternatives rather than answers or solutions*

The more we can focus on a variety of procedures and means for the attainment of a particular goal, the less likely we are to accept prematurely a particular answer or solution--which may or may not fit our particular problem. Many of us go around with a number of answers and solutions for which there are no problems.

8. *Focus feedback on the value it may have to the recipient, not on the value or "release" that it provides the person giving the feedback*

The feedback provided should serve the needs of the recipient rather than the needs of the giver. Help and feedback need to be given and heard as an offer, not an imposition.

9. *Focus feedback on the amount of information that the person receiving it can use, rather than on the amount that you have which you might like to give*

To overload a person with feedback is to reduce the possibility that he may use what he receives effectively. When we give more than can be used we may be satisfying some need for ourselves rather than helping the other person.

10. *Focus feedback on time and place so that personal data can be shared at appropriate times*

Because the reception and use of personal feedback involves many possible emotional reactions, it is important to be sensitive to when it is appropriate to provide feedback. Excellent feedback presented at an inappropriate time may do more harm than good.

11. *Focus feedback on what is said rather than why it is said*

The aspects of feedback which relate to the *what, how, when, where*, of what is said are observable characteristics. The *why* of what is said takes us from the observable to the inferred, and brings up questions of "motive" or "intent."

It may be helpful to think of "why" in terms of a specifiable goal or goals--which can then be considered in terms of time, place, procedures, probabilities of attainment, etc. To make assumptions about the motives of the person giving feedback may prevent us from hearing or cause us to distort what is said. In short, if I question "why" a person gives me feedback, I may not hear *what* he says.

In short, the giving (and receiving) of feedback requires courage, skill, understanding, and respect for self and others.

REFERENCE SHEET VI-2
SOME GUIDELINES FOR PROCESSING EXPERIENCES AND LEARNING

- Allow the work to come from the group rather than the trainer.
- Ensure that communication is betwen participants rather than from participant to trainer and trainer to participant.
- Allow sharing of past experiences with the piece of knowledge under discussion as to its use of applicability in the present.
- Use nondirective questions when possible.
- Ensure that participants take responsibility for what they say: "I" rather than "we."
- Keep goals and objectives of module and exercise in mind when processing.
- Allow ventilation of feelings in proportion to emotionality of the content or experience.
- If intense feelings are generated, don't let one person get labeled and scapegoated; distribute the feeling.
- Constantly ensure that helpful, descriptive feedback is given according to rules in previous article.

REFERENCE SHEET VI-3
THE TRAINING DESIGN MODEL: THE EIAG PROCESS

A training design is an attempt to plan a group's behavior in order to help group members learn something. The basic model for the design of most training sessions is the EIAG process. The EIAG process is a structured way of learning from experience. It is based upon the concept that people learn best by being actively involved in their own learning. EIAG is composed of four steps: The learner:

- Has an experience,
- Identifies the elements of that experience,
- Analyzes the meaning, usefulness, and applicability of what was learned,
- Generalizes about knowledge and skills acquired in this specific situation so that they can be applied in other situations.

E--Experience

Experiences in the training session should be related to information and skills the trainees want to learn. Trainees might try out certain tasks they'll be expected to perform on the job. For example, a module on treatment planning might include a videotape of a client presenting his case. Trainees would then use the information from the videotape to develop a treatment plan for this client. In this case, the videotape is the experience element of the EIAG process.

I--Identify

The trainess must identify what happened during the experience. We may notice only one or two things ourselves, but in fact many things are happening at the same time during any event. Pooling the group's observations of behaviors, ideas, and feelings ensures that everyone shares the same information about the experience. For example, after the experience of watching the videotape, trainees would identify the needs of the client. One person might identify two or three needs, while other group members might see, hear, and state other needs. Everything noticed should be discussed.

A--Analyze

Trainees should then think about why things happen as they did. They need to try to discover causes and forces--why the client expressed himself in a particular way, why he focused on some things and did not mention others, why he acted as he did. How did his actions affect the viewer? How did they affect the development of the treatment plan?

G--Generalize

After they have analyzed the situation, trainees should then apply what was learned in this specific situation to more general circumstances. What was learned from this experience in treatment planning that can be applied on the job? Generalizing is extremely important: trainees must be able to apply what they have learned in a controlled environment (the training session) to their jobs; otherwise, there is no purpose in training.

While the EIAG process is built into the design of most learning activities, it is made explicit as the trainer processes the activity. The trainer does this by:

- Reviewing or enabling participants to discuss meaningful aspects of the EXPERIENCE
- Enabling participants to IDENTIFY the behaviors, ideas, or feelings experienced
- Enabling participants to ANALYZE the meaning, usefulness, applicability of the behaviors, ideas, or feelings
- Enabling participants to take the specific behaviors, ideas, and feelings and apply them to other, possibly more complex situations that might be encountered back home; that is, to GENERALIZE from the training group to their on-the-job situation.

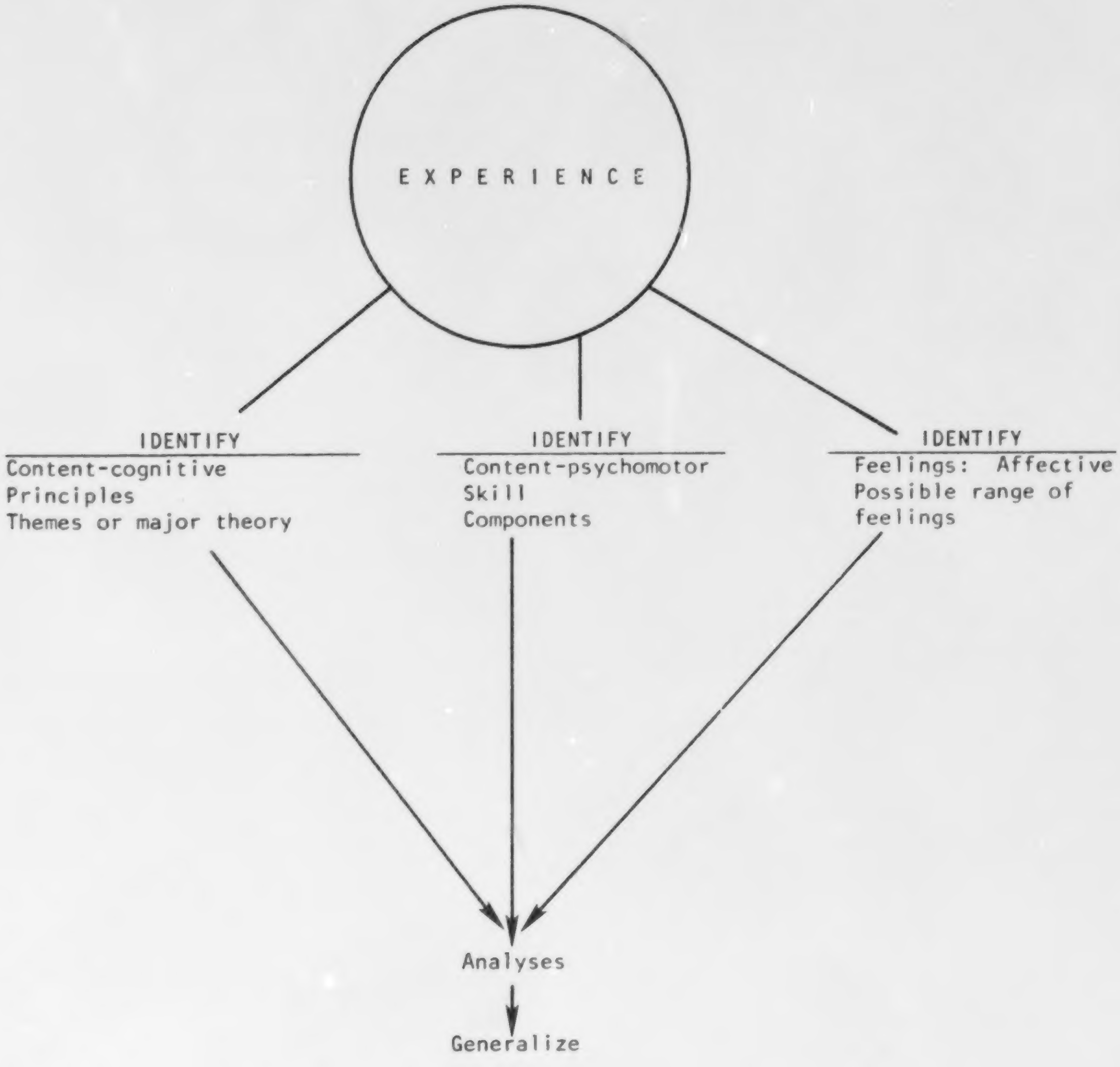
What we do naturally in "learning from experience" provides an excellent model for designing an effective training event and for processing discrete learning experiences. Training groups have a tendency to move quickly. It is very important that both the trainer and the group understand that people learn only when they take time to thoroughly identify and analyze an experience and to generalize from it.

REFERENCE SHEET VI-4
BIBLIOGRAPHY

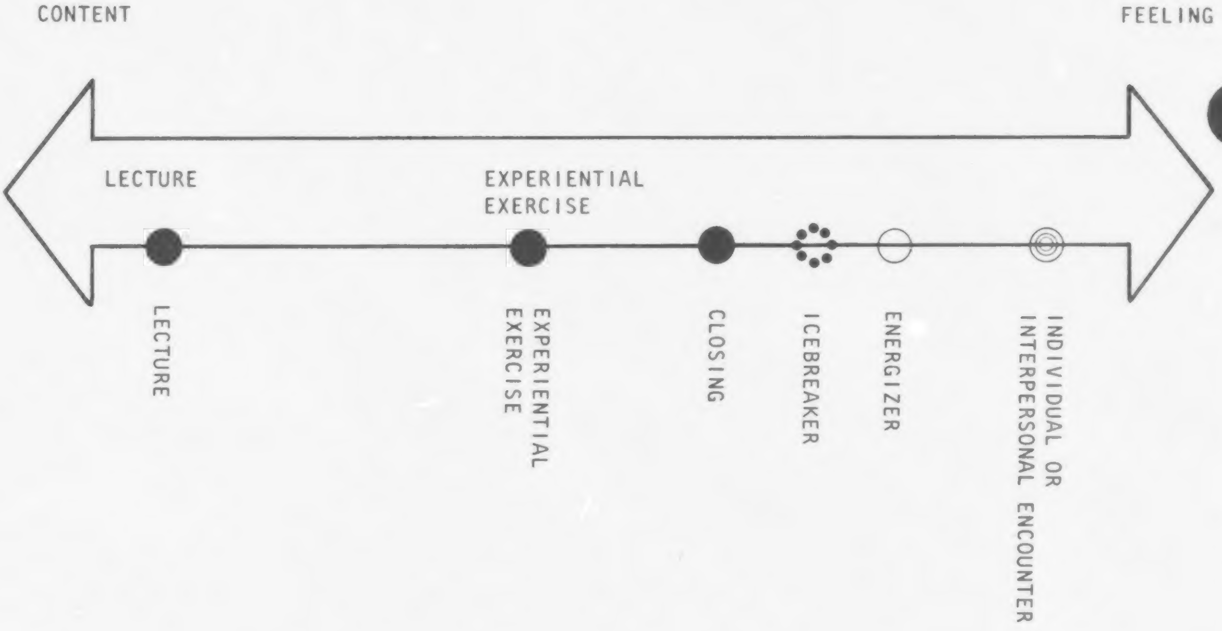
Miller, G.R., and Steinberg, M. Between People: A New Analysis of Interpersonal Communication. Science Research Associates, 1975. This is a well-rounded approach to the subject.

Interpersonal Relationships. Scott Foresman, 1973. A special-topic introduction to communication.

VISUAL VI-1:
INTERVENTION FOR PROCESSING



VISUAL VI-2
PROCESSING CONTENT AND FEELINGS



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MODULE VII

MODULE VII: FACILITATION: INTERVENING TO ENHANCE LEARNING

RATIONALE

Groups are an excellent learning environment for adults. Groups, however, are not always easy learning environments. There are many conflicting variables that must be managed when working with groups. The combination of learner, trainer, materials, and environment can have potent effects, and there is no way to predict from one group to the next whether it will work. A particular combination of participants may comprise an excellent group environment--one that is cooperative, able to handle occasional conflicts, and so on; another combination of participants may be unable to find a way of working together no matter how conflicts are handled. A particular trainer may be just right with one group, yet at a total loss with another. The materials, or the setting itself, may have an additional impact on how a group functions.

Even if it were possible to have the best training package, the most dynamic delivery skills, and the most sensitive ear for group process and processing, problems would still occur. Trainers must expect a number of difficulties during training sessions: it is rare for group meetings to proceed without any difficulties at all. However, problems are not necessarily indicators of poor facilitation.

Rather than being fearful of problems, a trainer must concentrate on a group's process to know when the group is functioning in a way that allows for meeting individual and group goals at the various stages of the group's development. When, in his or her judgment, it is not functioning effectively, there is a whole range of interventions that can help. This module covers the "when," "why," and "wherefores" of intervention. It introduces a conceptual framework for identifying events that create the need for trainer interventions in group process, and for examining the kinds of interventions trainers habitually make.

SYNOPSIS

This module opens with an overview and rationale. Prerequisite knowledge--the groundwork for intervention taught in the NDACTRD Group Facilitator Training Package--is reviewed briefly. After a brief discussion of the purpose of intervention and how it differs from feedback, the group spends 20 minutes discussing "war stories"--difficult situations or interventions that did not work as expected. This is followed by a large group exercise--a brainstorm of the range of conditions that might require intervention, given four major target areas for intervention. This elaboration of the conditions under which intervention take place leads into a presentation on the critical steps of the intervention process. Small group, case study discussions give participants a chance to examine this subject matter experientially.

This is followed by a small group self-study laboratory in which participants have an opportunity to intervene in ongoing group process. A discussion of module outcomes follows.

MODULE VII: FACILITATION: INTERVENING TO ENHANCE LEARNING **TIME:** 3 HOURS

GOALS

- To apply an organized procedure for determining when to intervene in a group's process
- To broaden intervention repertoires
- To practice intervening.

OBJECTIVES

At the end of this module, participants will be able to:

- List four conditions (or sources) for which trainers generally intervene in group process
- Define the elements of an effective intervention
- In response to case study descriptions, demonstrate a possible intervention that a trainer would make
- Identify problem situations that might require intervention and classify them as to condition or source.

MATERIALS

- Flip chart or newsprint
- Easel/tape
- Felt-tip markers
- Overhead projector and transparencies (optional)
- Participant Manual

MODULE VII: FACILITATION: INTERVENING TO ENHANCE LEARNING

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
10 MINUTES	1. MODULE OVERVIEW
	• Introduce the module by discussing its rationale and participant activities in terms of how its objectives will be met.
	NOTE: Participants are often very fearful of possible problems that might be encountered as they engage in training. And they want "hands-on" practice in coping with such situations. While this module is designed to give such practice--through group discussion, case study, and a laboratory experience--you should stress that skill practice is only useful insofar as trainers are able to attend to group process, hone their ability to intervene, and change focus only when the group is unable to handle a situation on its own. In other words, there is no need to intervene for intervention's sake alone. A major factor in intervention skills is knowing when to allow the group to take care of its own process.
20 MINUTES	2. DISCUSSION: INTERVENTION
	In this segment of the module, you will help the group establish a base on which to add knowledge.
	• Give/elicit from the group:
	- The definition of "intervention" - The purpose of interventions.
Worksheet VII-1	• Introduce Worksheet VII-1 on interventions in the Participant Manual and:
	- Give the definitions of "indicator" and "affect" as used in the worksheet.
	- Let participants know they will discuss a process to help decide whether or not to intervene--the "stop here."
	• Walk participants through the filled-out version of Worksheet VII-1 in the manual.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	• Facilitate a discussion in which participants share past experiences with interventions: - Those that worked - Those that didn't work - Unexpected results - Difficult situations - Questions.
25 MINUTES	3. LECTURE AND BRAINSTORM
	Keep participants in the large group for this discussion or facilitate breakdown into smaller groups if it is thought that the opportunity for fuller participation and greater intimacy would be fruitful.
	Whether or not participants realize it, they know a great deal about intervention--particularly, conditions that require it. Identifying those conditions requiring intervention, is, of course, the first step.
	• As a lead-in to the lecture on the interventive process, facilitate a large group brainstorm.
Flip Chart/Easel Newsprint Felt-tip markers	• Hang four pieces of newsprint having the following titles: - Individual participant - Environment (interpersonal/group) - Trainer - Materials/content.
Worksheet VII-1	• Clarify the relationship between these four items and Worksheet VII-1.
	• Explain that this represents a convenient way of breaking down the conditions or sources of difficulty that may require intervention.
	• Ask participants to identify specific problem situations under each heading in which a trainer might decide to intervene.
	• Record the items generated on each chart. (See Worksheet VII-1 for a sample.)

MODULE VII: FACILITATION: INTERVENING TO ENHANCE LEARNING

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
	The major point of this lecture is to provide a process for participants which can be internalized as a mental set to guide them in choosing whether or not to intervene.
	● Get across two main parameters for this choice: - The stage of group development, and - The inability of the group to work towards its goal.
Reference Sheets VII-1 through VII-5	NOTE: Refer participants to Reference Sheets VII-1 through VII-5 in their manuals for more information.
	● Review prerequisite knowledge from the Group Facilitator Training Package: - General idea of "critical points" at which intervention may be appropriate - Process issues of concern in making interventions
Visual VII-1	- Dimensions on which interventions may vary: focus, immediacy, responsibility (use Visual VII-1) - Timing and effect.
	● Create an atmosphere wherein participants may: - Determine stage of group development - Identify conditions that may require intervention - Determine whether conditions impair ability to reach goal or infringes on a member of the group - If yes, decide focus, immediacy, and responsibility - Assess reaction.
Worksheet VII-1	● Relate this to the Intervention Worksheet Example, "Stop Here," and the last two columns,

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	which guide the decision on whether or not to intervene and, if yes, which intervention to make.
Visual VII-2	• Use Visual VII-2 to get this across.
Selected Readings VII-1 through VII-6 Reference Sheet VII-6	(See Selected Readings VII-1 through VII-6 in the Participant Manual for additional important information for the development of the lecture. Reference Sheet VII-6, the bibliography for this module, may also be of help.)
40 MINUTES	4. DISCUSSION: SMALL GROUP CASE STUDIES
	Participants will now have an opportunity to put into practice the process just outlined.
	• Form small groups of five participants each.
Worksheet VII-2	• Refer participants to Worksheet VII-2 in their manuals for instructions.
Worksheet VII-3	• Ask participants to read each vignette case, in turn; the group may wish to fill out an interventions worksheet (Worksheet VII-3) for each vignette.
	• As a group, discuss each vignette in terms of: - Stage of group growth - Decide whether a condition exists that might require intervention - Decide whether an intervention should be made - If yes, decide on a plan of action or a sample intervention response - After 30 minutes, recovene the large group.
	If time permits, the following activity may be added after the small group case studies.

- Form small groups
- Allow participants to describe a particularly difficult situation they either imagine might occur or that has occurred
- Allow each group to give whatever help it can
- Briefly describe the situation and solutions in the large group.

---

75 MINUTES

5. EXERCISE VII-1: SELF-STUDY LABORATORY

- Form small groups of six to eight members who will form a fishbowl to discuss any one of the following topics for 20-30 minutes:
    - Cultural differences
    - Relating to an ethnically (or minority) mixed trainee group
    - Training in the "here and now"
    - Using trainee knowledge and data without giving up leadership/trainer role
    - Dealing with hostility
    - How it feels to practice doing training in the TOT group
    - Acceptable trainer behavior.
- Form three groups of observers, each of which will report on one of the following:
    - Group 1 reports on leadership, personal style, and stage of group growth
    - Group 2 reports on interventions made that attempt to improve atmosphere and/or to keep the group on the subject
    - Group 3 reports on any interventions that were felt to be unnecessary, questionable, or inappropriate.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	NOTE: During the activity, the trainer(s) acts as an observer, participating only if facilitation is absolutely essential. • Have observer groups meet for 10 minutes following a 20- to 30-minute discussion, to formulate reports to the large group; discussion group discusses their own process and plans a report. • Recommend large group listen to and discuss the four subgroup reports. • Help participants pull together the main points and relate them back to the intervention model.
10 MINUTES	6. MODULE OUTCOMES • Facilitate a summary of the extent to which the module met its objectives. • Discuss the methods, trainer input, and so on, to extrapolate those aspects of a worthy model of training design and delivery.
	END OF MODULE VII

WORKSHEET VII-1:

INTERVENTIONS WORKSHEET EXAMPLE

INDICATOR (Trainee Behavior)	AFFECT (Trainer's Assumption)	CONDITIONS				YES or NO	INTERVENTION FOCUS, IMMEDIACY, RESPONSIBILITY
		TRAINER	TRAINEE	ENVIRONMENT	CONTENT		
Trainee is staring out window	*Boredom*	*Trainer is being too wordy and unclear*				STOP HERE *To intervene or not?*	
Trainee is staring out window	*Excitement*			*Someone is streaking outside the training room*			
Trainee is staring out window	*Disgust*		*Trainee is talking again*				
Trainee is staring out window	*Fatigue*		*Trainee went to bed at 4:00 AM*				
Trainee is staring out window	*Boredom*				*Material is too technical and complex*		

WORKSHEET VII-1:

INTERVENTIONS WORKSHEET
(CONTINUED)

Sample

INDICATOR (Trainee Behavior)	AFFECT (Trainer's Assumption)	CONDITIONS				YES or NO	INTERVENTION FOCUS, IMMEDIACY, RESPONSIBILITY
		TRAINER	TRAINEE	ENVIRONMENT	CONTENT		
						STOP HERE *To intervene or not?*	

WORKSHEET VII-2
SMALL GROUP CASE STUDIES

PURPOSE:

- To identify whether trainer intervention is necessary.
- To decide focus of intervention.

MATERIALS:

Vignettes 1 through 3 (attached).

PROCEDURE:

1. Form small groups.
2. Each group member reads all of the cases.
3. As a group, discuss each vignette in turn.
   a. Identify the stage of group growth,
   b. Identify whether there is a condition that may require intervention,
   c. Decide whether trainer should intervene,
   d. Come up with a plan of action (or no action) or a sample interventive response.
4. Reconvene in large group and share summaries.
5. Discuss similarities and differences in action plans or interventive responses.

TIME:

40 minutes

Worksheet VII-2, Continued

VIGNETTE #1

Yesterday, the third day of training, a 1-hour segment of the course fell totally flat. At first, the trainers did not know what to make of it. The group had, to this point, been very responsive to the material. They were attentive during lectures, enthusiastic during discussions, and seemed to enjoy a videotape in which two people from a treatment agency acted out a counseling session to demonstrate three techniques being taught. In the segment that didn't work, participants were assigned roles--similar to those in the videotape--and asked to practice the same three skills. None of the participants was able to suspend his or her own identity sufficiently to get into the role play. Instead, there was just confusion, stiffness, and very little practice. Since the trainer was unable to figure out this phenomenon, she took 20 minutes of group time to discuss it. She discovered that this particular mix of participants from ____________________ found it impossible to pretend to be other than who they actually were, even though there was a similarity of setting and client problem, and that they could neither play roles nor make a skill transfer from assumed roles to their own roles.

Since the trainer anticipated a similar difficulty with the next three counseling skills to be taught the morning of Day 4 (through a similar sequence of activities), she took some time to think about what to do.

At what stage does the group appear to be? What might you do? Why? What would the focus be?

VIGNETTE #2

It is the morning of training Day 1. At first, the trainers thought things were going very well. People responded well to the icebreaker; they were lively and interested in each other. An overview of the course was well received, although the trainer felt a little unsure of trainee expectations of the course. The first didactic piece--a brief lecture--seemed flat. Things livened up a little as trainees discussed the content of the lecture and applied it to their own situations. The trainer was relatively silent during the discussion. However, there was not a lot of sharing; rather, each person who participated (a fair number said nothing) seemed to want to make a pronouncement, as if he or she knew more than anyone else and, certainly, more than the trainer. The atmosphere was growing increasingly tense; the trainer knew that he was growing increasing defensive.

The next segment was to be an experiential exercise involving some cooperation and trust. The trainer hesitated to go on with it, given the group atmosphere.

At what stage does the group appear to be? What might a trainer do? Why? What would the focus be?

VIGNETTE #3

This is the third day of a 4-day training event. By the end of the first day, the trainer was feeling almost relaxed. There had been a lot of silence (especially in the two small group activities after lunch), but, in the final activity following a film, there was a lively discussion in which everyone participated at some level. There was evidence of cohesiveness as a group and getting down to work in a serious, cooperative way. On Day 2, things went exceptionally smoothly. There were differences, but discussion of them led to exciting learning. One minor thing bothered the trainer: it was a mild tendency on the part of the group to make it clear that they didn't value the contribution of one member. That member, although by no means trying to hog the floor, did contribute ideas and examples that seemed somewhat trivial as compared to the level of contributions by others. He tended to be cut off, or his comments were not acknowledged; rather, the group hurried on to something else. The trainer felt that the situation was best left alone.

The third day began well enough. There was lively activity in the morning. In fact, the problem noted above seemed to lessen. The module covered received the highest rating to date. However, after a break with two short modules to go, things seemed to fall apart. There was tremendous restlessness and tension. The module opened with a brainstorm which received extremely sparce response. The ensuing discussion was filled with uncomfortable silence. The trainer was quite surprised and taken aback by the change in atmosphere.

At what stage does the group appear to be? What condition might require intervention? What would you do? What would the focus be? Why?

WORKSHEET VII-3:

INTERVENTIONS WORKSHEET

INDICATOR (Trainee Behavior)	AFFECT (Trainer's Assumption)	CONDITIONS				YES or NO	INTERVENTION FOCUS, IMMEDIACY, RESPONSIBILITY
		TRAINER	TRAINEE	ENVIRONMENT	CONTENT		
Trainee is staring out window	*Boredom*	*Trainer is being too wordy and unclear*				STOP HERE *To intervene or not?*	
Trainee is staring out window	*Excitement*			*Someone is streaking outside the training room*			
Trainee is staring out window	*Disgust*		*Trainee is talking again*				
Trainee is staring out window	*Fatigue*		*Trainee went to bed at 4:00 AM*				
Trainee is staring out window	*Boredom*				*Material is too technical and complex*		

WORKSHEET VII-3
(CONTINUED)

INDICATOR (Trainee Behavior)	AFFECT (Trainer's Assumption)	CONDITIONS				YES or NO	INTERVENTION FOCUS, IMMEDIACY, RESPONSIBILITY
		TRAINER	TRAINEE	ENVIRONMENT	CONTENT		
Trainee is staring out window	*Boredom*	*Trainer is being too wordy and unclear*				**STOP HERE** *To intervene or not?*	
Trainee is staring out window	*Excitement*			*Someone is streaking outside the training room*			
Trainee is staring out window	*Disgust*		*Trainee is talking again*				
Trainee is staring out window	*Fatigue*		*Trainee went to bed at 4:00 AM*				
Trainee is staring out window	*Boredom*				*Material is too technical and complex*		

WORKSHEET VII-3
(CONTINUED)

INDICATOR (Trainee Behavior)	AFFECT (Trainer's Assumption)	CONDITIONS				YES or NO	INTERVENTION FOCUS, IMMEDIACY, RESPONSIBILITY
		TRAINER	TRAINEE	ENVIRONMENT	CONTENT		
Trainee is staring out window	*Boredom*	*Trainer is being too wordy and unclear*				STOP HERE *To intervene or not?*	
Trainee is staring out window	*Excitement*			*Someone is streaking outside the training room*			
Trainee is staring out window	*Disgust*		*Trainee is talking again*				
Trainee is staring out window	*Fatigue*		*Trainee went to bed at 4:00 AM*				
Trainee is staring out window	*Boredom*				*Material is too technical and complex*		

REFERENCE SHEET VII-1
STAGES OF GROUP GROWTH REVISITED

The leader must continually re-evaluate the appropriateness of his/her interventions in relation to the maturity of the group. An insightful intervention is of no use if the group has not developed sufficiently and the members are not ready to respond constructively. A model of group growth is discussed here in order to help the leader choose appropriate interventions.

Several models of group development that include from two to eight or more stages are described in the literature on groups. Although it is true that groups develop systematically, many of the stages can occur at any time in the life of the group; therefore, the leader must remain flexible when applying a particular model.

The aim of all trainer intervention is to enable participants to fully take on responsibility for group climate and for reaching task goals.

During the initial phases of group growth, a phase when "I" concerns have not yet become "we" or "it" concerns, the trainer might intervene to bring about:

- Unfreezing behavior
- Cooperation
- Closeness/cohesiveness
- Effective feedback
- Risk-taking
- Norms and goals.

During the middle phases, the trainer might intervene around issues of:

- Working effectively
- Competition
- Conflict
- Information flow.

During any phase, intervention in problems of methodology (relevance of content) is appropriate.

During mature phases, the trainer might limit his/her intervention so that group members take over the responsibility of effective group functioning.

Intervention might occur around:

- Problem solving
- Interdependence.

The need to limit interventions must be emphasized at each stage. Although silence in a group can arouse anxiety, the anxiety often facilitates group growth. A leader should encourage group members to become responsible for the progress of the group. Too-frequent intervention can deprive the group members of the growth necessary to reach the closing stage and to become responsible for their own actions.

REFERENCE SHEET VII-2
SOME CONDITIONS THAT MIGHT REQUIRE INTERVENTION

FOCUS	BEHAVIOR
LEARNERS (Individual)	Nonconstructive role assumption
	Interruptions
	Freaking out
	Nonparticipation
	Boredom
	Inappropriateness (excessive self-revelation or emotional confrontation)
	Discomfort
	Noncooperation
METHODOLOGY	Out of time
	Too much time
	Exercise flops
	Too simple
	Too complex
	Environmental distraction
ENVIRONMENT (Group/interpersonal)	Conflict
	Argument
	Hidden agenda
	Restlessness
	Silence
	Defensiveness
	Noncooperation
	Discomfort (eye contact, posture, other nonverbals)
TRAINER	Positive trainer feelings
	Negative trainer feelings
	Mistaken expectations
	Mystification/demystification
	Lack of ability

REFERENCE SHEET VII-3
SHALL I MAKE THE INTERVENTION?

Before making the intervention, ask yourself these questions:

1. Have I examined my assumptions about why the indicator occurred?
2. What is the purpose of the intervention--what do I want it to accomplish? Is it relevant to the learning task?
3. Is it low risk or high risk? Does it have a chance of succeeding?
4. Is the timing appropriate for what's going on?
5. Does it fit my training style--will it succeed?
6. Is the intervention in harmony with the ground rules we've agreed upon?

REFERENCE SHEET VII-4
AVOIDING PROBLEMS

Here are some simple principles that are good to keep in mind in preventing problems or dealing with problems that do occur:

- Adequate preparation for a group is the best safeguard against serious problems.
- Make sure you know what the group expects of you, and let them know what you expect of the group.
- Be flexible in your planning; have alternate sequences of items on your agenda and substitutions in mind.
- Don't be too serious when you confront a problem. A little humor can make the situation much easier to handle.
- Make sure you have an understanding with the group members: they share the responsibility for the meeting. They are free to criticize and are responsible for letting the facilitator know what is going on and what their reactions are.
- Be honest with the group at all times.
- Try to anticipate problems you might have. Catching them early can help avoid them.

REFERENCE SHEET VII-5
SOME SAMPLE INTERVENTIONS WHEN THE LEARNER IS THE FOCUS
BYPASSES FOR ROADBLOCKERS

1. BULLDOZER: "It's got to go this way."

   Possible intervention: (We've agreed to abide by majority rule.)

2. MULE: "I won't let you!"

   Possible intervention: (Are we ready for a recess?)

3. RECOGNITION-SEEKER: "I need another medal."

   Possible intervention: (One medal per meeting is our limit.)

4. GROUP-SNATCHER: "If I'm funny enough they'll join me. I'll try clown antics and then a funny joke or ridicule."

   Possible intervention: (I sense you're not happy with our group goal.)

5. WINDY: "Now my twentieth point is..."

   Possible intervention: (Let's appoint a timekeeper to ring a bell after anyone has spoken more than 3 minutes.)

6. DRIFTER: "Have you heard about...that reminds me of..."

   Possible intervention (Let's appoint a subject-keeper to ring a bell when we get off the subject.)

7. MANIPULATOR: "I'll trick them into voting to have it my way."

   Possible intervention: (I don't think you're giving us your real reason. Could we look at your proposal below the surface?)

8. HELPLESS: "Someone do it for me--I'm so dumb."

   Possible intervention: (Why don't you just watch for a while until you gain confidence?)

9. SELF-CONFESSOR: "I'm no good--I'm always doing it wrong."

   Possible intervention: (You may be right.)

10. PARTISAN: "My side is the right side."

    Possible intervention: (You may be left.)

REFERENCE SHEET VII-6
BIBLIOGRAPHY

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Cohen, A.M., and Smith, R.D. The Critical Incident in Growth Groups: A Manual for Group Leaders. Useful for both research and training purposes, the manual allows users to classify and compare interventions and to identify styles.

Freedman, A.M. Types of process interventions. The 1978 Annual Handbook for Group Facilitators.

Lippitt, G. Selected guidelines for laboratory--group trainers. In: Modern Theory and Method in Group Training.

VISUAL VII-1
INTERVENTIONS

FOCUS

Individual	Interpersonal-group
Leader group	Materials/environment

IMMEDIACY

Content	Process
There and then	Here and now
Facts	Feelings

RESPONSIBILITY

Leader takes responsiblity	Group members are responsible for the group
Encourages leader/member interactions	Encourages member-to-member interactions

VISUAL VII-2
INTERVENTIVE PROCESS

Is this a critical point or incident?	1	Keep in mind group stage
Should I be more or less active?	2	Identify condition (its source) that may require intervention
Is learning hampered? Will group work toward goals? Is anyone being hurt by this situation?	3	Decide whether to intervene
Where should I intervene?	4	Decide focus
Is it immediate? Is responsibility placed correctly?	5	Intervene
Does group skirt? No impact? Is process sped up?	6	Assess effect

MODULE VIII

MODULE VIII:
ADAPTING TRAINING PACKAGES: UNDERSTANDING THE DESIGN PROCESS

RATIONALE

The purpose of this module is to help trainers adapt packaged training programs to groups of learners who have needs which may be different from those needs addressed by the planned activities and subject matter of the packaged curriculum.

One assumption underlying most packaged education programs is that there are many persons in the package's intended general target audience who need knowledge, skills, and/or attitudes.

Another assumption is that the sequence of topics and the methods selected and designed into the package provide the best learning climate for most prospective learners.

If a packaged training program has been carefully prepared, it will be frequently effective with equally carefully selected groups of participants, drawn from the intended target group.

A thorough learning needs assessment of the target group is part of careful preparation prior to course design. The curriculum is supposed to teach what the learners need to learn.

Also, participants should be carefully selected and admitted to the course based on their need to learn the knowledge, skills, and/or attitudes taught in the packaged curriculum.

The above assumptions about the design and the selection of the participants are often not completely fulfilled. When this happens, problems arise in the training workshop. The signs of discontent can vary from muffled yawns to outright confrontation to stormy walk-outs. All too often, the trainer diagnoses a process problem or believes he or she has facilitated poorly when the real problem is a mismatch between the course content and the learning needs of the participants.

Moreover, the principles of adult education theory presented in Module I suggest that every package needs some adaptation, even when both the above assumptions are true. The principle of readiness-to-learn implies that every participant must be ready and willing to lean now, in this climate, with this trainer, with these colleagues. If not, the workshop may be rejected even though the need has been carefully documented. Otherwise, readiness-to-learn may require additional exercises in which un-ready participants may confront their need to know and establish it before moving on. Each learner moves at his or her own pace. Packages sometimes overlook individual needs in a group. Given the need to adapt a packaged training program, then, how best to do it?

This module takes the position that understanding the design process itself is the most useful tool for trainers in diagnosing what is wrong and what needs to be modified.

Knowledge of the rationale behind each step of a systematic process of needs assessment and curriculum design will provide the trainer with a framework for surfacing potential mismatches between packaged programs and selected target groups. When such advance warning is not possible, knowledge of design will enable trainers to more accurately diagnose which of the four training variables--1) learner, 2) trainer, 3) method, and 4) environment--may be the source of workshop problems.

Once the cause of the problem is correctly diagnosed, the trainer has a better chance of choosing the correct strategy for modification.

A caveat about the extent of this module's coverage of program design is required here. Competence in program design cannot be achieved in a 3-hour module. Therefore, participants will learn only the theory of design, and will not practice each of the steps. The purpose of this module is to provide a cognitive framework for successful adaptation of packaged designs.

SYNOPSIS

After a brief overview and rationale, the trainer facilitates dyadic and large group discussion of participants' experiences with adapting training packages. This is followed by analysis of training problems that might lead to curriculum modifications. During this analysis the participants develop a number of critical incidents they will further analyze at a later point in the module. The trainer then presents a lecture on the design process which supplies a framework for the previous work. In a lengthy exercise, participants then apply design process concepts in further diagnosis of training problems and in adaptations of inappropriate curriculum designs. This activity is followed by summarizing module outcomes.

MODULE VIII: ADAPTING TRAINING PACKAGES: UNDERSTANDING THE DESIGN PROCESS **TIME:** 3 HOURS 10 MINUTES

GOALS

- To enable participants to effectively accommodate packaged training programs to particular needs of specific target groups
- To present the rationale for systematic program development process as a useful diagnostic framework for identifying the learning assumptions underlying the educational technology of packaged curriculum designs.

OBJECTIVES

At the end of this module, participants will be able to:

- Recognize the need to modify or expand packaged training programs by relating personal experiences of ineffective training due to rigid adherence to packaged curriculum plans
- Identify the steps in a systematic program development process which ensure that the principles of adult education will be adhered to in each training exercise
- Identify the adult learning assumptions underlying each step
- Identify what data are generated in each step to specify the design, trainer's role, learner participation, and environment.

MATERIALS

- Flip chart or newsprint
- Easel/tape
- Felt-tip markers
- Overhead projector and transparencies (optional)
- Participant Manual

MODULE VIII: ADAPTING TRAINING PACKAGES: UNDERSTANDING THE DESIGN PROCESS

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
10 MINUTES	1. MODULE OVERVIEW

- Outline the purpose of the session by stating the goals and objectives. Review the rationale for the module.
- Make the following points in this overview:
    - The purpose of the module is to help trainers make effective adaptations to packaged designs whenever necessary.
    - The session will present a theory of program design for use as a framework for diagnosing apparent mismatches between curriculum goals and goals of the learner audience.
    - Knowledge of design theory is not only helpful in modifying packaged curricula well in advance of the event, but it can contribute to a more accurate diagnosis of the probable source of dysfunction during the course of a training event.
    - The sequence of exercises will be experience-oriented and problem-centered. Participants will be asked to share personal experiences of dysfunctional training events. After listening to a lecture presentation on design theory, they will re-examine those design experiences using design theory as a diagnostic tool. Finally, participants will be asked to apply their new analytic techniques to a section of a selected curriculum package and several critical incidents.

30 MINUTES	2. DISCUSSION: GROUP EXPERIENCE OF NEED FOR ADAPTATION

The purpose of this incident-sharing discussion is to establish an awareness on the part of the group that its members have experienced the need to modify or expand packaged programs for specific audiences.

The activity will be successful if many examples of ineffective training events due to rigid application of packaged curricula are cited. Useful, too, will be examples of effective training events which occurred after modification and changes had been made to packaged curricula.

- Begin the discussion by describing an experience wherein a training event failed to meet the needs of the participants even though it was conducted "by the book."
- Divide group into dyads.
- Instruct dyads to share incidents of a similar nature.
- Have participants turn to the person next to them and share personal experiences of an effective or ineffective training event due to use or nonuse of adaptations.

Flip Chart/Easel
Newsprint
Felt-tip Markers

- Ask for volunteers to share results of dyadic discussion with the larger group of participants.
- Record responses on newsprint using the following headings:

Curriculum Description	Intended Audience	Problem Encountered	Adaptation Required

- Record at least six incidents beneath each heading.
- Conclude discussion by indicating that the next activity will analyze these same incidents in greater detail.

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60 MINUTES

3. DISCUSSION: PROBLEM ANALYSIS

The purpose of this activity is to give participants an experience of analyzing training problems and the need to modify curriculum without the benefit of an organized, systematic process for doing so. The activity will be successful if many questions prompted by adult learning theory (Module I) are asked about the incidents recorded on the newsprint. It is hoped that participants will ask the

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	right questions and end the activity with an awareness of the need for a more organized framework to ensure such problem diagnosis in the future.
	• Select one incident which has been recorded on the newsprint to be used as an example, or use the personal example which started off the dyadic discussion in the previous activity.
	• Lead a large group brainstorm of an analysis of the incident using the following questions as a framework: - What are the objectives of the curriculum? - What assumptions about the needs of the learners were made? - What facts or data are required to validate these assumptions? - How can these needed facts or data be gathered on short notice during the training event itself?
	• Divide participants into groups of four.
	• Ask participants to use the principles of adult learning reviewed in Module I to further diagnose the problem described in the critical incidents on newsprint as well as any evidence of mismatch of curriculum and learning needs of this ad hoc NDACTRD TOT event.
	• Give the following instruction: - "Examine the list of critical incidents on the newsprint, and select one which someone in your group has knowledge of."
Worksheet VIII-1	- "Analyze the incident using a question-and-answer format based on the principles of adult learning which were reviewed at the start of the workshop." Refer participants to Worksheet VIII-1 in the Participant Manual.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*

  - "Next, apply the same question format to our experience together in this workshop, which is now in its third day."
  - "Select a reporter to share your group analysis of either this event or the selected critical incident (time does not permit reports on both), and suggest a possible adaptation given the new data generated."
- Give participants 20 minutes for their analysis and suggested adaptations.
- Request 5-minute reports from each group.
- Summarize the activity with the following points.
  - Many new pieces of information were unearthed by the questions asked.
  - These questions were prompted by the theory of adult learning.
  - The questions asked were haphazard but useful, and some effective program adaptations were suggested.
  - The purpose of the next presentation is to offer a more structured, organized process for such analysis.

---

20 MINUTES

4. LECTURE: WHY LEARN THIS THEORY?

The purpose of this lecture presentation is to demonstrate that an organized, step-by-step process of needs assessment and curriculum design is the best guarantee that the principles of adult learning will be adhered to and will shape the four variables which affect the training event (i.e., learner, trainer, environment, methods).

The steps of the process contribute information necessary for the trainer to successfully manage the four variables affecting the training event. The steps of the process yield data which confirm or deny the assumptions inherent in each of the training variables. Acquiring an understanding of design theory will help a trainer pinpoint the source of curriculum problems and construct adaptations more efficiently and effectively.

Steps in the Design Process: Sequence

Visual VIII-1

- Project the flow chart (Visual VIII-1) on the screen and describe the nature of each step, the data yielded by each step, and how the problem gets into clearer focus as the process proceeds forward.

- Cover the following points:

The major design categories are:

- Needs Assessment

    - Organization analysis
    - Performance standards analysis
    - Conduct actual performance analysis
    - Analyze deficiencies
    - Training group analysis

- Curriculum Building: Macro Design

    - Define training goals
    - Sequence topics (content)
    - Select general method
    - Select evaluation

- Curriculum Building: Micro Design

    - Define specific behavioral objectives
    - Select specific training techniques
    - Develop content required
    - Develop materials and media.

- Review the following factors of each step of the process:

    - Definition of step/purpose

    - Principle activities

    - Products generated by each step

    - Assumptions behind the step

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	- Adult learning principles evident - Relationship to four training event variables
Selected Reading VIII-1	NOTE: Additional back-up material can be found in the Participant Manual, Selected Reading VIII-1. ● Call for questions to classify participants' understanding of the design process rationale.
60 MINUTES	5. EXERCISE VIII-1: APPLYING THE DESIGN PROCESS The purpose of this exercise is to demonstrate how "the training event problem" gets sharpened into better focus by viewing it from the perspective of each step of the design process sequence. Each step yields information about what the trainer can and cannot assume about the learning needs and learning readiness of the participants. ● Select one of the previously reported "critical incidents" and review the learning assumptions able to be made by "walking through" each step of the design process ● Show how more and more is known about the problem as the design sequence is followed ● Suggest several possible adaptive changes based on information yielded by this diagnostic review. For example: - Reordering of content - Add-on activity to allow for more experience sharing - Restate the relevance of the topic to participants' jobs - Rewrite case examples - Eliminate excessive self-disclosure activities

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
	- Design a mini-lecture outlining the knowledge, attitudes, and skills to be learned
Worksheet VIII-2	● Divide participants into groups of four and instruct each group to re-analyze the same "critical incidents" reported earlier. This time, ask the groups to use the design process as a diagnostic tool and to suggest possible adaptations to the packaged curriculum. Use the handout (Worksheet VIII-2) provided in the Participant Manual to guide the design-oriented diagnosis.
	● Have the group work for 20 minutes and report as follows:
	- If each step of the design process was followed in developing the curriculum used in the "incident," what assumptions can be made about each of the four variables affecting the "problem event"?
	- What steps in the process should yield the most useful data for possible adaptation?
	- What steps may have to be redone to clear up any ambiguity about the learner's trainer role, methodology, or environment?
	- What on-the-spot adaptations are called for as a result of this new diagnosis?
	- If this diagnosis had been done 2 weeks in advance of the "problem event," what adaptations could have been possible?
	● Ask for comparisons between the first and second diagnostic exercises. Hopefully, the second exercise which used the design process framework will have yielded a richer variety of possible adaptations.
	● Deliver this trainer summary comment:
	The key to effective adaptation is to know as much as possible about the background of the curriculum in order to help the learners confront their need to learn what the curriculum proposes to teach.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
10 MINUTES	6. MODULE OUTCOMES ● Close the module by: - Facilitating a review of the goals, objectives, rationale, and content of the module. Were the objectives achieved? Will the learnings be useful? - Facilitating a brief discussion of the module as a model: methods and media used, trainer style and skills, etc.
	END OF MODULE VIII

WORKSHEET VIII-1
ADULT EDUCATION QUESTION FORMAT

1. What were the assumptions about the LEARNERS?
    - Motivation
    - Readiness to learn
    - Ability to learn
    - Individuality and autonomy
    - Experience of the group
2. What were the assumptions about the TRAINER?
    - Adaptable style
    - Agreed-upon role
    - Knowledge of topic
    - Leadership
    - Facilitation skill
3. What were the assumptions about the ENVIRONMENT?
    - Psychological appropriateness
    - Physically conducive to learning
    - Size of group
    - Composition of the group
4. What were the assumptions about the METHODOLOGY?
    - Self-directed activities
    - Experience-based activities
    - Problem-centered activities
    - Learnings which are able to be immediately applied
    - Practical application of skills back on-the-job

WORKSHEET VIII-2
DESIGN PROCESS DIAGNOSTIC QUESTIONS

I. NEEDS ASSESSMENT

A. Organization Analysis

- What priority of need does organization place on having these participants learn these new knowledge, skills, attitudes?
- What does the salary level indicate?
- Is the job essential to the organization achieving its goals?
- Why has the organization asked for this training?

B. Performance Standards Review

- What is the standard for performance of this behavior on-the-job?
- What tasks does the profession usually expect?
- What is a minimum example of competency?
- What would be a maximum example?
- Whose performance will be analyzed?
- What level of knowledge am I looking for?
- What level and types of skills am I looking for?

C. Performance Analysis

- How does the observed performance of each task compare to what is required?
- What knowledge is lacking?
- What attitudes are lacking?
- What skills are lacking?
- Can training solve all the problems identified?

D. Training Group Analysis

- What deficiency areas are shared by enough people to warrant a training event?
- Are there any knowledge deficiencies in common?

- Are there any skills lacking for the total group?
- Is the whole group lacking in any basic attitudes necessary to do its job well?
- How many varieties of knowledge deficiencies have emerged?
- Can these workers be sent elsewhere to be trained in this isolated deficiency?
- Is there a sufficient variety of attitude deficiencies to warrant a special training focus on attitudes alone?
- How many persons carry the same characteristic?
- How aware of the characteristic are they?
- Do they think of themselves as a group?
- Should training groups be assembled on the basis of one or several of these characteristics?
- Is the worker "teachable" at this moment?
- Is the worker interested in spending time to learn now?
- Is the boss requiring cooperation?
- Does the worker realize his knowledge, skill, deficiency?

II. CURRICULUM BUILDING: MACRO DESIGN

- Are the goals of the program related to the needs of the participants?
- Does each goal statement express some general measure of how and when I will know that the desired result has been achieved?
- What topics are usually appropriate for achieving the goals?
- Is the sequence of topics the best for the participants' experiences and interest?
- Is the overall method of the event the most appropriate for these participants?
- How will the learning be evaluated?

III. CURRICULUM BUILDING: MICRO DESIGN

- Are instructional objectives clear?
- Is there a variety of activities?

Worksheet VIII-2, Continued

- Is each small group task clearly stated?
- Is each activity: self-directed, problem-centered, experienced-based, applicable immediately?
- Is there sufficient time to move from room to room?
- Fatigue factor?
- Is there time to relax and assimilate?
- Is a "getting acquainted" exercise needed?

VISUAL VIII-1

I. NEEDS ASSESSMENT

- ORGANIZATION ANALYSIS
- PERFORMANCE STANDARDS ANALYSIS
- CONDUCT ACTUAL PERFORMANCE
- ANALYZE DEFICIENCIES
- TRAINING GROUP ANALYSIS

II. CURRICULUM BUILDING: MACRO DESIGN

- DEFINE TRAINING GOALS
- SEQUENCE TOPICS (CONTENT)
- SELECT GENERAL METHOD
- SELECT EVALUATION

III. CURRICULUM BUILDING: MICRO DESIGN

- DEFINE SPECIFIC BEHAVIORAL OBJECTIVES
- SELECT SPECIFIC TRAINING TECHNIQUES
- SEQUENCE ACTIVITIES
- DEVELOP CONTENT REQUIRED
- DEVELOP MATERIALS AND MEDIA

MODULE IX

MODULE IX: PRACTICUM

RATIONALE

This module requires that participants fully assume responsibility for their learning. In it, participants present a brief learning piece, process it, and receive feedback from their peers. Although this brief presentation in no way approximates the trainer's conduct of a total training event, it does represent an opportunity to integrate delivery and processing skills, techniques, methodology, and so on. No Training of Trainers course would be complete without this "hands-on" practice.

SYNOPSIS

After a brief overview of the module, participants will be asked to deliver and process their mini-presentations to the members of their small group. Those who are listening will use an observer sheet in order to provide feedback to the presenters.

The presentations are followed by a discussion of module outcomes.

MODULE IX: PRACTICUM

TIME: 3 HOURS 25 MINUTES

GOALS

- To give participants an opportunity to design or redesign a learning task using methods with which they have little experience
- To give participants an opportunity to receive feedback on their style, delivery, processing, and/or interventive skills.

OBJECTIVES

At the end of this module, participants will be able to:

- Given a topic, write or modify goals and objectives for a learning activity appropriate to a particular audience
- Given acceptable objectives and an audience, design or redesign a learning activity that is appropriate for the audience
- Deliver and process a learning piece that the participant has modified
- Having presented and processed a learning piece, obtain feedback from colleagues.

MATERIALS

- Participant Manual
- Other materials as needed for trainees' presentations

MODULE IX: PRACTICUM

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
10 MINUTES	1. MODULE OVERVIEW Very little introduction/overview will be required for this module. Having completed the previous modules, participants should be well prepared to take over the delivery of the content of this module. o Briefly review the goals and objectives of the module as listed in the Participant Manual.
2-3 HOURS	2. PRACTICUM In this module, the trainer facilitates participant presentations. Every participant should have the chance to deliver a learning piece that he or she has designed or redesigned from an existing course segment. NOTE: The trainer will have been preparing participants for these presentations from Day 2 through Day 4 so that everyone should be ready. Keep in mind that each presentation will take 20 minutes at the very least. Some additional time (5 to 10 minutes) will be alloted to feedback after each presentation. Additional breaks may be necessary between presenters. Groups of four participants, then, might be able to comfortably complete presentations in 2 hours. For larger groups (7 participants at a maximum), 90 minutes can be set aside for additional presentations during the afternoon before beginning Module X.
Worksheet IX-1	Identify the four alternatives from which participants may choose material for their presentations (see below). Refer participants to Worksheet IX-1, Presentations Checklist.

MODULE IX: PRACTICUM

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	NOTE: Three of these alternatives appear in detail in the Participant Manual. The other alternative, adapting some piece of this course, does not appear in the manual since participants may choose any piece from Days 1 through 4.
	The four alternatives are:
	• Adapt objectives or target audiences and learning activity from this TOT package, and deliver and process it. (No materials are provided for this alternative; a participant wishing to choose this would have to confer with the trainer and use his or her materials).
Worksheet IV-2	• Adapt one of the four learning activities from Worksheet IV-2 in the Participant Manual to a particular target audience and deliver and process the activity.
Worksheet IX-2	• Adapt the learning piece from Worksheet IX-2: Women in Treatment I, Module III.
Worksheet IX-3	• Adapt a piece from Worksheet IX-3 on third-party payments.
	Now that participants are ready to make their presentations:
	• Facilitate the breakdown into small groups (usually of four each).
	• Remind participants about adhering to the time constraint of 20 minutes maximum.
	• Require participants to share the goals and objectives and any other pertinent information before beginning their presentation.
Worksheet IX-4	• Ensure that those who are observing use the appropriate instruments in Worksheet IX-3, which provide feedback.
	NOTE: If videotape capability is present, you can make its use available to participants. However, many group members resist videotape use for a variety of reasons.

TIME, MEDIA, AND MATERIALS	OUTLINE OF TRAINING ACTIVITIES
	Feelings about it must be elicited and respected.
15 MINUTES	3. MODULE OUTCOMES o Briefly go over the extent to which objectives were met. o Review the format of the "modeling" discussion in terms of what may be changed. Each participant's presentation might be looked at in terms of what is modeled. o Lighten the atmosphere by leading an informal "awards ceremony," in which you request recommendations for: - The best delivery - The best processing - The most innovative presentation - The most exciting presentation - Etc.
	END OF MODULE IX

WORKSHEET IX-1
PRESENTATIONS CHECKLIST

This list is for you to use as a checklist in preparing your presentation.

A. TRAINING DESIGN

Plan to begin your presentation with a brief explanation of the following elements in your training design:

____ 1. Behavioral objectives: Give 1) desired terminal behavior, 2) criteria, and 3) conditions.

____ 2. Trainee characteristics: Give your assumptions about your learning audience.

____ 3. Strategy selection: Name your media and methods and relate them to your objectives and your trainees' abilities.

____ 4. Presentation.

____ 5. Processing: Plan to process the activity.

B. TRAINING DELIVERY (PRESENTATION)

Think about the following points as you conduct the training:

____ 1. Confidence. Communicate to trainees that you know what you're doing, believe in what you're doing, and enjoy doing it.

____ 2. Content mastery: Demonstrate that you know the subject being presented.

____ 3. Expression: Use voice (volume, tone, pitch, and talking speed), posture (poise), and gestures (alive body and facial expression) to create excitement, interest, and enthusiasm.

____ 4. Sensitivity to audience needs: Keep aware of the group's messages to you and respond/adjust in ways to keep trainees with you.

____ 5. Time: Stay within the time allotted to you.

____ 6. Evaluation: How appropriate was your evaluation activity in terms of trainees' energy, time constraints, etc.?

C. AUDIENCE RESPONSE

____ 1. Interest level: Did the trainees look/act interested in what was going on?

_____ 2. Involvement level: Did the trainees take part in the training event by doing and speaking as well as by looking and listening?

_____ 3. Satisfaction level: Did trainees indicate a positive response through the evaluation activity?

WORKSHEET IX-2
WOMEN IN TREATMENT I: ISSUES AND APPROACHES

The module you have been given is Module III: Characteristics of the Female Addict.

MODULE III: CHARACTERISTICS OF THE FEMALE ADDICT

PURPOSE

Together, Modules III and IV stimulate trainees to re-examine their beliefs about the female addict. The purpose of Module III is to ensure that all trainees have a common base of knowledge about the female addict. This module includes:

- Characteristics of the Female Addict as Depicted in the Literature
- The Female Addict Today
- Assessing Client Needs

LEARNING OBJECTIVES

At the end of the module, and without the aid of notes, the trainees will be able to:

- Identify at least four characteristics of the female addict as described in the lecture
- Identify at least two methodological problems in research on the female addict
- In a simulated assessment interview--

  identify at least four kinds of information needed for a client assessment and

  identify at least two needs and two problems of the client
- From the lecture material and the readings, select the most appropriate response on the posttest given a situation in which the concepts apply

MODULE: III TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
9:10- 9:40	Lecture: Characteristics of the Female Addict (continued) (III-B-1)			T	Has a diminished capacity to experience joy and pleasure without the use of drugs. Psychological Dynamics (MMPI scores) Shows a lack of self-confidence, narrowness of interests, tendency to worry. May be extrapunitive, relies on a power orientation. Drug Use Patterns Generally turned to drugs for "kicks." Tends to use medical narcotics (morphine, etc.) and sedatives more than men do. Seems to become addicted more quickly than men. Relationships with Men Exhibits multiple problems in close relationships. Frequently has a spouse or partner who is involved in illegal activities. Fears being physically harmed by spouse. Homosexuality Engages in homosexual relationships more frequently than do males. Health Rarely receives proper health care, even for serious conditions. Has more gynecological problems than non-addict. Pregnancy Believes that heroin is a contraceptive.

MODULE: III   TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
9:00- 9:10	Introduction to Module III (III-A)		LG	T	● Introduce the module by relating the content of Module II (attitudes, myths, and stereotypes about women) to the female addict. "People view the female addict through the filter of their attitudes, myths, and stereotypes about women. Often this leads to assumptions about the female addict: what she is like, how she should act, and why she takes drugs. As treatment staff, we need to continually re-examine our beliefs about the female addict, since those beliefs influence our behavior towards her."
9:10 9:40	Lecture: Characteristics of the Female Addict (III-B-1)	Lecture outline on newsprint	LG	T	● Lecture on the characteristics of the female addict (see p. 93 for the complete lecture). Methodological Problems in the Research Limitations in Sampling Chein, The Road to H Interpretation of Data Curlee, alcoholic women Family Background May be closer to father than mother. Is a product of battering and emotional neglect. Was subjected to strict sex-role socialization. Shows a lack of affective and cognitive resources.

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
9:10-9:40	Characteristics of the Female Addict (continued) (III-B-1)			T	Does not actively plan birth control. Does not tolerate well the normal discomforts of pregnancy. __Unrealistic Expectations about Pregnancy__ Believes everything will be fine now. Feels pregnancy will serve as impetus to "straighten out." Anticipates that baby will bring many fringe benefits. __Education, Skills and Means of Support__ Has a disadvantaged educational background. Shows a history of difficulties in school. May engage in prostitution. May engage in shoplifting. May practice other criminal activities.
9:40-10:00	Discussion III-B-2	Newsprint Markers Masking tape		T and t	● Discuss the characteristics of the female addicts in the trainees' treatment programs.
				T	● Facilitate the discussion by asking trainees to describe how the female addicts they treat are similar to or different from those described in the readings and the lecture. List on the newsprint the characteristics of the female addict as described by the trainees.
				T and t	● Then discuss the probable effects of societal conditioning on female addicts.

MODULE: III TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
9:40-10:00	Discussion (continued) (III-B-2)			T	• Facilitate the discussion by asking trainees to think about the myths, stereotypes, and attitudes about women discussed in Module II. Ask trainees if they think the addicted woman has internalized some of these beliefs. If so, which ones? If the addicted woman feels that she does not meet the standards does this affect her self-concept and behavior?
				T	• List on newsprint the effects of societal conditioning on the female addict as identified by the trainees.
10:00-10:15	Break				Break
10:15-10:25	Assessment Interview Exercise (III-C-1)	Client History Treatment System Overview Client Needs Form	LG	T	• Define "Need" and "Problem" (see definitions in Instructions p. 105). • Explain the exercise. The exercise is a simulation of the first of a series of assessment interviews with a female client. The purpose of the interview is to identify the client's needs and problems. At the end of the interview, trainees will be asked to describe the client's needs. • Give instructions for the exercise (see full instructions on p. 105).

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
10:25- 10:35	Preparation for the Interview (continued) (III-C-2a)			T	• Discuss how she will play the part of the client. • Ask her to fill out Client Needs Form and copy on newsprint her assessment of the client's needs.
				Vol. t	• Discuss, with the trainer, characteristics of the client. • Fill out the Client Needs Form identifying the client's needs, then list those needs on newsprint. • Review the Client Needs Forms; have extra available for trainees. • Select a group member to be timekeeper (or the trainer can be timekeeper). • Select a group member to be the first interviewer. Continue to the right around the circle to choose the next trainee to play the interviewer.
10:35- 11:10	Assessment Interview (III-C-3)		SG	T	• Ask client to rejoin the group.
				t	• Interview the client for four minutes each. • Take notes on the needs and problems of the client.

MODULE: III TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
10:15-10:25	Assessment Interview Exercise (continued) (III-C-1)			T	This will be a role play in small groups. A volunteer will play the client. The other trainees in the small group will act as counselor-interviewers, each having four minutes to interview the client. Each interviewer should build upon information obtained by past interviewers. After all the trainees have interviewed the client, the group should have enough information to identify the client's needs and problems. ● Divide trainees into three small groups; assign a trainer and a small-group room to each.
				Ts	● Take small groups to their assigned rooms.
10:25-10:35	Preparation for the Interview (III-C-2a)	Newsprint		T	● Prepare the total group for their role in the exercise (5 min.) ● Ask the group members to read the Client History and Treatment System Overview (in Trainee's Workbook) while you are out of the room. After that each small group member should think about four questions she would want answered in an assessment interview. ● Explain to the small group that you are going to take the next five minutes to work with the client volunteer about her role. ● Take the client volunteer outside the large-group room to prepare her for the exercise. Give her the Client History to read.

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
12:05- 1:15	Lunch				Lunch

MODULE: III

TITLE: Characteristics of the Female Addict

TIME	TASK/CODE	MATERIALS & EQUIPMENT	FORM	WHO	ACTIVITIES
11:10-11:15	Identifying needs and problems (III-C-4)	Client Needs Form	SG	t	• After the role play is finished, write on Client Needs Form the needs and problems of the client as they were presented in the interview; then list on newsprint.
				T	• Take the client outside the room and help her get out of the role she played.
11:15-11:50	Discussion (III-C-5)	Client's assessment of needs (a) written on newsprint	SG	T and t	• In the small group, review the client's description of her needs. • Discuss the client assessments. • Ask trainees to compare their assessment with the client's assessment of her needs. How do they differ: How are they similar? Why? What happened in the interview? • Facilitate the discussion to explore the ways in which the female addict is stereotyped. Did participants stereotype the client? How does stereotyping of female clients take place in treatment programs? • Discuss the ways in which stereotyping occurs in treatment programs.
11:50-12:05	Review of Assessment Exercise (III-C-6)			T and t	• Return to the large group to summarize the mornings activities. • Review the module. Ask the trainees to describe what they learned from this module.

PURPOSE: To give trainees an overview of the characteristics of the female addict as portrayed in the literature

TIME/ CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40

III-B-1

> The literature on women addicts is very sparse compared to the reams produced each year that deal with men;. . .researchers have overlooked the special problems of women addicts and have been content to generalize from the data about men (Waldorf).

METHODOLOGICAL PROBLEMS IN THE RESEARCH

There are problems existent in any research effort, especially when that effort involves as diverse a population as women in treatment. Many of the myths and stereotypes about the female addict emanate from these imperfections in research methodology. For example, Damman wrote that the

> ...conclusion that the female addict is sicker and more deviant than her male counterpart results from: (1) research in opiate and alcohol abuse that was deficient in methodology, data, and interpretation; and (2) attitudes found in our society that condone different types of behavior for men and women and hence endorse the idea that women who do certain things are more deviant than men who do the same things.

She notes that the literature creating a profile of the female addict as sick and deviant resulted, in part, from a very small number of women entering substance abuse treatment programs, from limited research attention paid to them, and from poor methodology employed when studying them.

Prior to the sixties, the tendency was to either exclude women from studies on addiction or lump them together with men. The findings (which pertained primarily to male addiction) were projected upon the female addict population. In the sixties, however, there was some acknowledgement that lumping male and female addicts together might distort the data and its interpretation. Nonetheless, the initial awakening of research interest in female addicts in treatment was not necessarily beneficial. As with most minority groups, female addicts received separate but unequal "treatment" from social science research.

Limitations in Sampling

An example of this trend can be found in *The Road to H,* an early comprehensive study of heroin abuse. Isidor Chein et al. (1964) were among the first researchers who recognized the methodological problems presented by using the small sample of women opiate addicts in the general study of addiction. In discussing this methodology they commented:

> If female(s) are not materially different in relevant aspects of their drug use from males. . .then, in excluding them from the study we have sacrificed little. . . . If. . .there are materially relevant differences, including [women] obfuscates the picture for all. Why not study all groups separately?

Shortly after, Chein conducted a study in which male and female addicts were discussed separately: one chapter was devoted to summarizing the findings on 20 female addicts, the rest to a carefully controlled examination of 202 men. The men were divided into four groups, which were controlled for a variety of factors, including history of delinquency, drug use, and institutionalization.

CONTENT ON THIS PAGE: Methodological problems in the research, continued; Family Background

TIME/ CODE — LECTURE: **CHARACTERISTICS OF THE FEMALE ADDICT**

9:10-9:40 III-B-1 None of the controls used to study the men were applied to the women; therefore the conclusions about the female addict were researched without employing a uniform research design and without controlling for variables.

Although Chein for the most part avoided commentary about overt sex-linked differences between male and female addicts, other writers commenting on the study have suggested that Chein found the female addict to be sicker and more deviant than her male counterpart (Zahn and Ball, 1974). This process by which profiles containing *implicit* comparisons are interpreted as if those comparisons had been *explicit* occurs frequently in social science literature . This is the process by which myths are created. Chein's study merely reported on 20 female addicts; it did not purport to be exhaustive. Nonetheless, the chapter summarizing one exploratory study on the 20 females was entitled "The Female Addict," not "A Study of 20 Female Addicts." This chapter is cited in virtually all the literature appearing on female addicts. In the absence of contradictory data, the image of the female addict as sick and deviant became generalized by this process of citation; the picture was further supported by societal attitudes about females in general (Ehrenreich and English, 1973; Freud, 1963).

Data Interpretation

The interpretation of data is another methodological problem to be considered. One example involves a study by Joan Curlee of 100 men and 100 women of middle- to upper-middle-class backgrounds to investigate the contention that alcoholic women demonstrate a higher degree of serious pathology than alcoholic men (1974). Curlee concluded that the women had been judged to have a higher degree of serious pathology on the basis of the amount of previous psychiatric treatment they had received and were thus considered psychologically sicker than men. She disapproved of this basis. A history of psychiatric treatment episodes is suspect as an index of sickness because women receive more cultural support than do men for seeking psychiatric treatment and women do so more often. Treatment per se is therefore not necessarily indicative of sickness (cf. Chesler, 1972).

Note to Trainer:

For additional examples of limitations in sampling and problems in data interpretation, see Note following this lecture.

FAMILY BACKGROUND

Most studies have found that female addicts generally come from predominantly blue-collar backgrounds. One study found that although more women's fathers than men's were professionals, women also had a higher proportion of fathers with criminal records and sporadic employment histories.

Women addicts describe their parents differently than do men. They seem to relate better to their fathers, whereas males say they related better to their mothers. Women described their mothers as distant, authoritarian, and cold. Fathers were often described as indulgent and seductive; in fact, many women addicts (25 percent in one study by Densen-Gerber) have experienced sexual relationships with fathers or father surrogates.

CONTENT ON THIS PAGE: Family Background, continued

TIME/ CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40

III-B-1

Women addicts also report that they have experienced less compatability within their family of origin than have men. In Waldorf's study, 25 percent of the women (compared to 11 percent of the men) stated that they got along poorly with their families before beginning to use heroin. White women were found to have had worse relationships with their families than did black or Puerto Rican females. Chein found that 70 percent of his female sample ". . .were recurrently in trouble with their parents."

Many women addicts grew up in a home with an addict or alcoholic relative. Waldorf found that 46 percent of the women in his sample (compared to 26 percent of the men) grew up in a home that had alcoholic or addict members.

In his book *The Road to H*, Chein reported on the incidence of deprived home situations among female addicts. More than one fourth of his sample had lived in foster homes as children. Fathers were found to have been frequently absent during their early or later childhood and parents were either exceedingly strict or overindulgent. Fifty percent of the parents of these women had alcohol problems, compared to only 30 percent of the males' parents.

One prevalent characteristic of women addicts is that they come from emotionally disadvantaged family backgrounds. Chambers et al. report that 54.8 percent of the addicted women they studied were raised in broken homes. Family dissolution occurs more frequently and at an earlier age among female addicts than among males.

As children, these women were deprived of nurturance and warm, loving care. Their parents made unrealistic demands and had expectations inappropriate to the child's age or development. When they could not satisfy these demands they were criticized and punished.

The addicted women studied by Mondanaro paint a very dismal picture when asked to describe their home environment, and how their parents (or guardians) demonstrated love. Toys and books were usually nonexistent. Parents were not involved in the children's school work and accomplishments; parents taught them few skills to cope with the demands of the home environment or to prepare them for adult living.

In Mondanaro's study, she discovered that female addicts were often the products of strict sex-role socialization. Girls were raised to be girls: passive, dependent, feminine, coy, and nonassertive. According to Bem, this type of strict sex-role socialization ". . .correlates with high anxiety, low self-esteem, and low self-acceptance."

Emotional neglect as an inf[illegible] parents' expectations of premature performance, and strict sex-role socialization fostered a sens[illegible] personal inadequacy in these women. As a result of this upbringing and the fear of failure, criticism, and punishment it engendered, many addicted women seem to have a diminished capacity to experience joy and playfulness, and are afraid of taking risks in relationships with other people.

The female addict appears to be a product of battering. The sense of failure and low self-esteem derived from an emotionally deprived home experience are reinforced by society at large. In a society that judges human worth by material power (class), by color of skin (race), and by the presence of a penis (sex), poor people, nonwhites, and women are considered less worthy (Mondanaro).

The family of origin and society both echo and re-echo words the child hears and ultimately believes—that she is no good. Some victims of this type of battering use drugs, some demonstrate other self-deprecating behaviors.

CONTENT ON THIS PAGE: Psychological Dynamics; Drug use patterns; relationships with men

TIME/ CODE	LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40

III-B-1

PSYCHOLOGICAL DYNAMICS

Using the Minnesota Multi-phasic Personality Inventory to analyze the psychodynamics of male and female addicts, Olson found that

> ...the males were significantly more defensive and guarded and the women were more frank and indiscreet with a noticeable tendency to be more critical of themselves. The higher D (Depression) score in the female group suggests that they were characterized by a lack of self-confidence, narrowness of interests, and had poor morale, a tendency to worry, uneasy self-concern, and dissatisfaction with their immediate situation. The significantly higher Pa (Paranoid) score suggests that the women were using the paranoid mechanisms of projection, extra-punitiveness, and reliance on a power orientation. . .the high Pt (Psychasthenia) also suggests that the women showed more doubts, perplexity, and apprehension, or unreasonable fears, than did the men.

Ellinwood et al. found that women addicts were more frequently diagnosed as neurotic and psychotic, whereas men were more often labeled as having personality disorders or being sociopathic.

Waldorf notes that ". . .when women become addicts they suffer more guilt and remorse because it is harder for them to go against society's prescription for femininity and its laws and mores." Because little deviation is allowed women within their sex-role socialization (for example, it is not permissible for a female to "sow wild oats"), they usually feel more constraints to abide by the established norms and legal code of the culture. Thus, when they do deviate, they may suffer about it more than do men.

DRUG USE PATTERNS

Chambers et al. found that the majority (57 percent) were initially turned on to illicit drugs through a friend, and did so for "kicks" or because of curiosity. Thirty-one percent started to use drugs through medical or quasi-medical channels; the drugs used were legally manufactured, a pattern more prevalent among white addicts than blacks. A third group, 11 percent of the sample, were introduced to drugs by an addicted family member.

Several studies have revealed that male and female addicts seem to differ, in some respects, in terms of patterns of drug use. Ellinwood et al. found that medical narcotics (e.g., morphine and Demerol), alcohol, and sedatives were more frequently used by females than by males. Women seemed to become addicted more quickly than men and took a longer time to attempt abstinence.

RELATIONSHIPS WITH MEN

Generally female addicts have been married, but the relationship is usually fraught with multiple problems. The family and societal environments that bred the woman's feelings of low self-esteem and lack of confidence are usually repeated in her relationships.

The addict's spouse or partner is often, but not always, involved in drugs. He is usually not gainfully employed. His "work" may be stealing, boosting, passing bad checks, dealing drugs, and pimp-

CONTENT ON THIS PAGE: Homosexuality; Health; Pregnancy

TIME/ CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40 III-B-1 ing. He may be violent, taking out his frustrations by beating his wife and child. The wife's fear of being physically harmed by her spouse, should she decide to leave, cannot be under-estimated. Many women maintain these relationships because there are moments of love and warmth within them and the alternative seems to be having no relationship at all.

HOMOSEXUALITY

Although many women seek and find love in homosexual relationships, these, too, may pose problems. Waldorf notes that "American society stigmatizes addicts, prostitutes, and homosexuals and often the female addict is at least two of them—sometimes three. . . ." Thus, in addition to feelings of guilt about prostitution, the female addict may suffer considerable emotional pain from violating society's norms concerning homosexuality. One study reports that many more female addicts than males are homosexual: 29 percent of the females compared to only 3 percent of the males admitted to being either homosexual or bisexual.

Twenty-three percent of the women also reported having engaged in homosexual prostitution while in the streets. Many female addicts seem to become lesbians as a result of suffering abuse by men while prostitutes.

HEALTH

Female addicts also frequently have problems in the area of health. One study found that many women addicts suffer from thyroid disorder, hypertension, asthma, and hepatitis—conditions that require, but rarely get, proper treatment. Another study notes that "most women caught in the criminal-addict treadmill have had one or more abortions," which may have caused gynecological damage. One gynecological study of female addicts found that 90 percent had had venereal disease, and 63 percent were infertile during the period of drug abuse.

PREGNANCY

The addicted woman normally does not plan to get pregnant. Since heroin interferes with normal ovulation and menstruation, the woman is accustomed to missing periods frequently. The notion that the addict is protected from conception while using heroin is widespread. A woman may go for years without using birth control and not get pregnant. Although pregnancy may create great hardships, many female addicts will elect to continue their pregnancy. Some writers have described this as a symptom of women's passivity and inability to act on the world. Many addicted women do not actively plan birth control, and when they find themselves pregnant, they again do not actively think through their various options (abortion, adoption, detox or methadone maintenance, heroin continuation, barbiturate continuation).

Addicts do not tolerate the normal discomforts of pregnancy well. When they experience difficulty sleeping, irritability, fatigue, nausea, and other pains associated with pregnancy, women maintained on methadone often feel that their doses are not high enough. There is also a high incidence of obstetrical complications such as toxemia of pregnancy (pathological disorders generally manifested as metabolic problems), breech presentations, placental abnormalities, and postpartum hemorrhage. Many babies are premature and/or addicted and many show evidence of retarded intrauterine growth. Some experts believe that these babies may become predisposed to drug addiction later in life.

TIME/ CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40

III-B-1

The incidence of pregnancy among addicts has been found to be increasing, especially among those under 21 years old, who account for 50 percent of all such pregnancies.

Many mothers frequently talk about "guilty feelings" during their pregnancy. Mondanaro states that many pregnant addicts may be saying that they will feel guilty when and if the child experiences withdrawal.

Unrealistic Expectations Resulting from Pregnancy

Many women believe that now, since they are pregnant, their own mothers will accept and love them; their husbands will get it together, get straight jobs, stop drinking, lose weight, rent a larger apartment, pay more attention to them, stay home more, be helpful around the house: in general, the quality of life will improve. They also believe that they will not use heroin or other drugs because that will hurt the baby and they don't want to do that. Many feel being pregnant will give them impetus to "straighten out."

When questioned about difficulties and disappointments they can foresee surrounding the birth of the baby, the women usually see no obstacles to their happiness, and truly believe that the child will bring many fringe benefits. Anyone who has been a parent can relate to the unrealistic aspects of these beliefs.

EDUCATION, SKILLS, AND MEANS OF SUPPORT

Female addicts have been found to have had disadvantaged educational and occupational backgrounds. Most studies indicate that approximately 66 percent of this group have not completed high school and have usually dropped out of the tenth or eleventh grade after a long history of learning difficulties, misbehavior, and chronic truancy.

Among female addicts in the New York Civil Commitment Program, 65 percent had arrest records. Prostitution and shoplifting were the most frequently used means of financial support during an addiction career, although one-third of the sample also reported having committed burglaries, armed robberies, and/or muggings.

SUMMARY

We have discussed characteristics of the female addict as described in the literature: her background, her relationships, her feelings about herself and her role. We have also mentioned a few of the problems inherent in the interpretation of research data. Your resource manual contains several reference papers you may want to read for further information.

Some of the characteristics that I have mentioned may pertain to clients in your own programs. Some of the female addicts you have treated may have other characteristics. What are some of the similarities and differences you have noted?

Note to Trainer:

Following are more examples of methodological problems that can be used if needed for discussion.

TIME/CODE

LECTURE: CHARACTERISTICS OF THE FEMALE ADDICT

9:10-9:40 III-B-1 *Facilitate discussion of characteristics of female addicts in trainees' treatment programs by asking trainees to describe how their clients are similar to or different from those described in the readings and the lecture. See also Note to Trainer for examples of characteristics as identified by trainees during the field test.*

OTHER EXAMPLES OF METHODOLOGICAL PROBLEMS

Other examples of limitations in the sampling procedure are evident in studies by Mellinger and Parry. In 1971, Mellinger et al. found that psychotherapeutic drug use was greater among women than men. Parry et al. (1973) studied use of prescribed tranquilizers/sedatives and found daily use to be most prevalent among lower income, more poorly educated housewives.

The format in both the Mellinger and Parry studies suggests that sampling procedures may have led to underrepresentation of street drug users. The data generated by these studies were collected by interviewing respondents who were "selected by rigorous sampling methods in order to form a cross-selection of American adults in households" (Parry et al., 1973). The restriction to "adults in households" suggests that institutionalized adults were not considered; also, that persons not living in a stable residence may have been excluded. A footnote suggests that, if represented at all, "street people" constituted a very small portion of the total sample since, "Those few women who were neither employed nor full-time housewives, e.g., nonworking, unmarried students, were omitted from our analysis."

Finally, by restricting their sample to adults, the authors biased their description of the patterns of drug use by not including persons under 18. Unlike the street drug user who may represent a small portion of the population, persons under 18 represent a singificant percentage of the population in most metropolitan areas. For example, they represent 30 percent of the San Francisco Standard Metropolitan Statistical Area (SMSA) population.

Data Interpretation

A study by George De Leon (1974) involved 148 men and 60 women to measure the extent of and change in psychopathology during the course of treatment. The author used seven self-report scales. On the basis of these scales he found differences related to both sex and ethnic background. Females in each ethnic group (black, white, and Puerto Rican) scored higher (indicating a greater degree of depression, anxiety, or other indicator of pathology) than their male counterparts. "These findings," the author notes, "point to the possibility that for women, especially white and Hispanic (Puerto Rican), addiction may relate to or express a more serious and complex psychological disturbance." However, what De Leon fails to note is that self-report scales are particularly vulnerable to cultural norms: high scores may reflect a self-perception of deviance from those norms, rather than sickness, per se. It may be that women report themselves as deviant because they believe they are. However, since deviance from norms is not necessarily sickness, to interpret the elevation of self-report scales as sickness, without considering cultural and ethnic norms, is to overlook the probable impact of labeling. An interpretation (of self-report scores) such as the one offered by De Leon can become part of an invidious tautology: female addicts score higher on scales purporting to measure psychopathology; therefore, they are judged to be sicker, are told they are sicker, are treated as if they are sicker and, therefore, score higher on scales measuring sickness (psychopathology) (cf. Chesler, 1972 ; Broverman, 1970; Gordon and Hall, 1974).

TIME/
CODE

NOTE TO TRAINER: DISCUSSION ABOUT CHARACTERISTICS OF THE FEMALE ADDICT

9:25-
9:45

III-B-2

This list represents the viewpoints of one group of trainees. The trainees in your session may generate different items. This brief exercise gives the total group information about how individuals view the female addict. The data give the trainees a "feel" for the group and a starting point to help individuals analyze their approach to women's treatment.

The following are some of the characteristics of the female addict as identified by trainees during the field test.

- low self-esteem
- bad self-image
- no direction
- lack of confidence
- heavy family conflicts
- guilt
- lack of skills
- broken home
- confusion between love and sex
- difficulty dealing with feelings of dependency--dependency or counter-dependency
- poor adult models
- no sense of belonging
- not feeling good about other women, hence not feeling good about themselves
- no elementary life skills (eg., communication, problem-solving)
- "I'm competent, but my 'sister's not competent"

TIME/ CODE

NOTE TO TRAINER: ASSESSMENT INTERVIEW EXERCISE

10:15-11:45

III-C

The purpose of this exercise is to identify both the information needed for assessment and the needs of a female client.

FORMS

The **Treatment System Overview** is used to set the stage for the interview. This form gives basic information about the treatment project so that all group members have a common frame of reference. The interviewers assess the client's needs and later (if there is time) discuss whether they think her needs can be met through this treatment system.

The **Client History Form** provides basic information about the client. It gives the interviewers data they can use to formulate their assessment questions; it gives the client some data from which to develop her characterization of the client.

To assist the client-volunteer in developing her characterization, she should be asked to fill out the **Client Needs Form** before the interview. This will help her focus on the needs and problems of the client she's playing and will help her to remain in the role during the exercise.

After the interview, each small-group member fills out the Client Needs Form. Then the small group writes a composite list on newsprint to help them compare and analyze their perceptions of the client. This is then compared with the client's perceptions of her needs.

Because each small group uses the same forms, a common frame of reference is established for the large group discussion that concludes the exercise.

To ensure that the small groups have as similar an experience as possible, it is extremely important that you discuss how each of you will conduct this exercise. While the small groups are reassembling in the large group meeting room, you should meet briefly with the other trainers to review what each covered in the exercise.

In the process of this exercise several things happen:

1. Since each trainee has an opportunity to interview the client, the exercise reveals a sample of the various interviewing styles used by small-group members. This provides experiential data that can be referred to throughout the course when examining (a) the effects of interviewing styles on clients, (b) the problems in eliciting information from clients, (c) the interactions between counselor and client, and (d) the ways in which the client is stereotyped (as perceived by either counselor or client). You should point out:
   - The way in which information is transmitted and interpreted and how it affects assessment of the client
   - How interviewing styles influence the amount and kind of information given by the client in the interview
2. As small group members discuss their own perceptions and the client's perceptions of her needs, they become aware of information they have missed, assumptions they have made, and conclusions they have drawn in interpreting the interview data. This assists trainees to sharpen their assessment skills.

Trainees will further develop these skills in Modules IV and V when they analyze videotaped interviews.

PURPOSE: To give trainees practice in assessing client's needs

TIME/ CODE

INSTRUCTIONS: ASSESSMENT INTERVIEW EXERCISE

10:15-11:45

III-C

Title

ASSESSMENT INTERVIEW EXERCISE

Space Requirements

- One large-group room
- Two small-group rooms

Seating Arrangement

Each small group sits in a circle. In the center of the circle there should be two empty chairs: one for the client and the other for the interviewer.

Materials

- Client Histories
- Client Needs Forms
- Treatment System Overviews

Trainer Instructions

- Define "need" and "problem":

  "Need" is a lack of something necessary, desirable, or useful; implies urgency.

  "Problem" is a complex, unsettled question; a source of worry or concern.

  Adapted from *Webster's Dictionary*

- Explain the exercise.

  The exercise is a simulation of the first of a series of assessment interviews with a female client. The purpose of the interview is to identify the client's needs and problems. At the end of the interview, trainees will be asked to describe those needs and problems.

- Give instructions for the exercise.

  Trainees will be divided into three small groups. Each small group will participate in a role play to assess client needs. A volunteer will play the client. The other trainees in the small group will act as counselor-interviewers, each having four minutes to interview the client. Each interviewer should build upon information obtained by past interviewers. After all the trainees have interviewed the client, the group should have enough information to identify the client's needs and problems.

TIME/ CODE

INSTRUCTIONS: ASSESSMENT INTERVIEW EXERCISE

10:45-11:45
- Divide trainees into three small groups; assign a trainer and small-group room to each.
- Take small group to assigned room.

III-C
- Select a volunteer to be the female client. Explain to group that for the next five minutes you will be working with the volunteer to help her establish her role.
- Give trainees the Client History and Treatment System Overview to read while the volunteer and trainer are out of room.
- Ask each trainee to think about four questions she would want answered in an assessment interview.
- Take the client volunteer outside the large-group room to prepare her for the exercise; give her the Client History to read.
- Discuss how she will play the part of the client.
- Caution the volunteer to wait until the third interviewer before she *fully* states her problems.
- Review the Client Needs Form with the volunteer. Ask her to fill it out, and then copy it on newsprint. (This will help strengthen her characterization.)
- Review with the small group their role as counselor-interviewers. In order to have every trainee participate, the interview will be divided into four-minute segments, each segment having a different person as interviewer. Each interviewer is to build on the information obtained by prior interviewers.
- Review the Client Needs Form in trainees' workbooks.
- Tell trainees to take notes on the needs and problems of the client as they are disclosed during the interview.
- Select a group member to be timekeeper (or take the role of the timekeeper yourself).
- Select a group member to be the first interviewer; start the role play; continue around the circle to the right to select the next trainee to play the interviewer.
- After the role play is finished, give trainees five minutes to write out the client's needs and problems and write a composite list on newsprint.
- While the small-group members are writing their observations, take the "client" outside of the room and help her get out of the role she played.
- In the small group, review the client's description of her needs (written on newsprint).
- Discuss the client assessments.
- Ask trainees to compare their assessment with the client's assessment of her needs. How do they differ? How are they similar? Why? What happened in the interview? Can the treatment system meet the needs expressed by this particular client?
- Facilitate the discussion to explore the ways in which the female addict is stereotyped. Did participants stereotype the client? How does stereotyping of female clients take place in treatment programs?
- Discuss the ways in which stereotyping occurs in treatment programs.

CLIENT HISTORY

Form III-C-1

Name:	June Dendy
Age:	28
Marital Status:	Separated
Number of Children:	2 girls, 8 and 10 years
Drug of Choice	Heroin
Employment Background:	Clerk typist, Salesgirl, Waitress
Present Employment:	None

Client got pregnant with first child during senior year in high school. Dropped out of high school and got married. After her second child was born client went to night school to get her high school diploma. History of marital problems--husband drank and was verbally abusive to client and children. Separated from husband five years ago. Client moved in with her mother and held various jobs to support herself and children. Client's mother currently is taking care of both children.

Client has been unemployed for seven months, during which time her heroin habit has gone from moderate to severe. While she was employed, she was using heroin once or twice a week, for about three months. When in high school, she had tried grass and pills several times but had stopped when she discovered she was pregnant. But, during the last few months of her employment, she began using heroin on a daily basis, and selling "hot" merchandise at her job to supplement her income. She says Frank, whom she met six months ago and has been dating regularly since, encouraged her to use heroin more often, saying she could support her habit by fencing his stuff. Although she was never caught, she was afraid, and her fear was one reason for her leaving her job.

Since leaving her job, she has devoted most of her energy to fencing stolen goods around the neighborhood and prostitution. Her mother is becoming increasingly resentful of caring for the children, and is putting pressure on June to get treatment and get a job. June feels that her mother is being unreasonable, but does recognize that getting off heroin is a good idea. She feels at loose ends when not on dope, but, more importantly, she's worried about getting busted, especially since Frank was busted three weeks ago for housebreaking.

She says she's really scared and wants help getting herself together.

FORM III-C-2

TREATMENT SYSTEM OVERVIEW

METHADONE TREATMENT PROGRAM

TYPE OF PROGRAM--Private, nonprofit program under direction of the County Regional Drug Abuse Commission. Provides 90 percent of its outpatient care to narcotic addicts and provides inpatient care through General Hospital, which also works with other area drug abuse programs. Center located in a converted residence.

SERVICES--Methadone maintenance, medical-surgical treatment. Also: chemical and drug free detoxification, crisis and legal intervention, educational and family counseling, encounter and self-awareness groups, other group interaction, group and individual therapy, vocational training, job placement, meditation, recreational therapy, social services, supervised work assignments, therapeutic community, Big Brother and Big Sister Program, referral.

ADMISSION--Must reside in county, be 18 or over, and have no severe medical or psychiatric problems. Hospital patients must meet OEO poverty criteria.

CLIENTELE--All age groups 18 and above but predominantly 21-28. Greatest number use natural opiates, but some abuse of all drugs except tranquilizers. Majority unemployed, unskilled.

STAFF--(Combined personnel of Center and Hospital working with Methadone Treatment Program) Full time: psychologist, 3 R.N.s, business administrator, 3 counselors. Part time: 2 psychiatrists, physician. 2 vocational rehabilitation personnel, program administrator, 2 pharmacists, community worker. Volunteers, part time: physician, psychologist, R.N., nursing aide, 3 paramedics, 22 counselors, 5 clergymen, pharmacist, 2 public education personnel. Former drug abusers: full-time caseworker, part-time caseworker. Center budgeted vacancies: psychologist, R.N., 3 counselors.

Form III-C-3 Your Role: ______________

CLIENT NEEDS FORM

In the space above, write whether you are acting as the client, or as an interviewer. State your assessment of the client's needs based on the information obtained in the interview.

CLIENT NEEDS

WORKSHEET IX-3
THIRD PARTY PAYMENTS

The module you have been given is Module I: Introduction to Third Party Payments.

SESSION I

LEARNING OBJECTIVES

The purpose of this session is to establish an appropriate learning environment by outlining the course content, explaining the course structure and providing a general explanation of the third party payments system.

At the end of this session participants will be able to–

- define "third party payments";
- identify the three parties in a third party payments system;
- identify at least five implications for a drug abuse treatment program seeking third party payments ;
- identify the two methods by which service providers are reimbursed in a third party payments system;
- identify the two types of third party payers.

SESSION: 1

SESSION REQUIREMENTS	
PERSONNEL	Trainer
TIME	2 hours
EQUIPMENT	Chalkboard Flip chart easel
MATERIALS	Pretests Prepared flip charts (F-l, F-2, F-3) Note pad and pencils for each participant Handout H-l (Sample Daily Schedule)
FACILITY	Large-group meeting room

Session 1: INTRODUCTION

TIME/ FORM	MATERIALS & EQUIPMENT/ REFERENCES	ACTIVITIES
30 min. LG	Pretest	PRETEST • Administer pretest.
15 min. LG M-L/D	Chalkboard	INTRODUCTION • Introduce each trainer/facilitator. • Explain purpose of the course: *This course is intended to provide information that will help you (a) assess feasibility of obtaining Third Party Payments and (b) determine required actions for obtaining TPPs.* (Write on chalkboard.) • Note that the course provides guidelines but cannot specify each step required to obtain TPPs.
	Handout (H-1) (Daily Schedule) Flip Chart (F-1)	• Outline the course content and daily schedule. *(Write on newsprint and see sample flip charts at end of activities sheets.)* • Discuss the logistics *(when, where, any rules)*. • Answer any questions.
15 min.		WARM-UP EXERCISE • Explain purpose of the exercise: *This exercise should help you become acquainted with each other.* • Use whatever technique you have found to be useful to help trainees identify names and/or other associations *(e.g., treatment modality represented)*.
45 min. LG M-L/D		INTRODUCTION TO THIRD PARTY PAYMENTS • Define third party payments:
	p. 17	*A third party payment is a payment for a service provided to an individual by an individual or organization that neither receives nor provides the service.*

TIME/ FORM	MATERIALS & EQUIPMENT/ REFERENCES	ACTIVITIES
		INTRODUCTION TO THIRD PARTY PAYMENTS (CONT'D)
	p. 18	• Explain key terms: client *(service recipient)* provider *(service provider)* third party *(e.g., John Hancock Co., Medicaid).* service *(assistance given to client)*
	Flip Charts F-2, F-3	• Explain interrelationships among client, provider, and payer. *(See sample flip charts)*
	Figure 1.1 Figure 1.2	• Distinguish types of third party payers: *Public reimbursers* Federal/state programs supporting services to various categories of individuals, i.e., Medicaid, Medicare, title XX, Vocational Rehabilitation, etc. *Private reimbursers* Profit making *(e.g., Aetna, John Hancock)* Nonprofit *(e.g., Blue Cross/Blue Shield)*
		• Discuss the fact that public reimbursers presently provide most payments for addicts.
		• Note that to obtain TPPs, the eligibility of the client, provider, and service must be established.
		• Mention that each type of eligibility will be discussed in greater detail in a later session.
		• Note some of the difficulties existent within the third party payment's system, for example: Federal regulations regarding eligibility vary considerably between programs. State criteria vary between states and within each program *(i.e., no two states have the same set of criteria for Medicaid).*

Session 1: INTRODUCTION

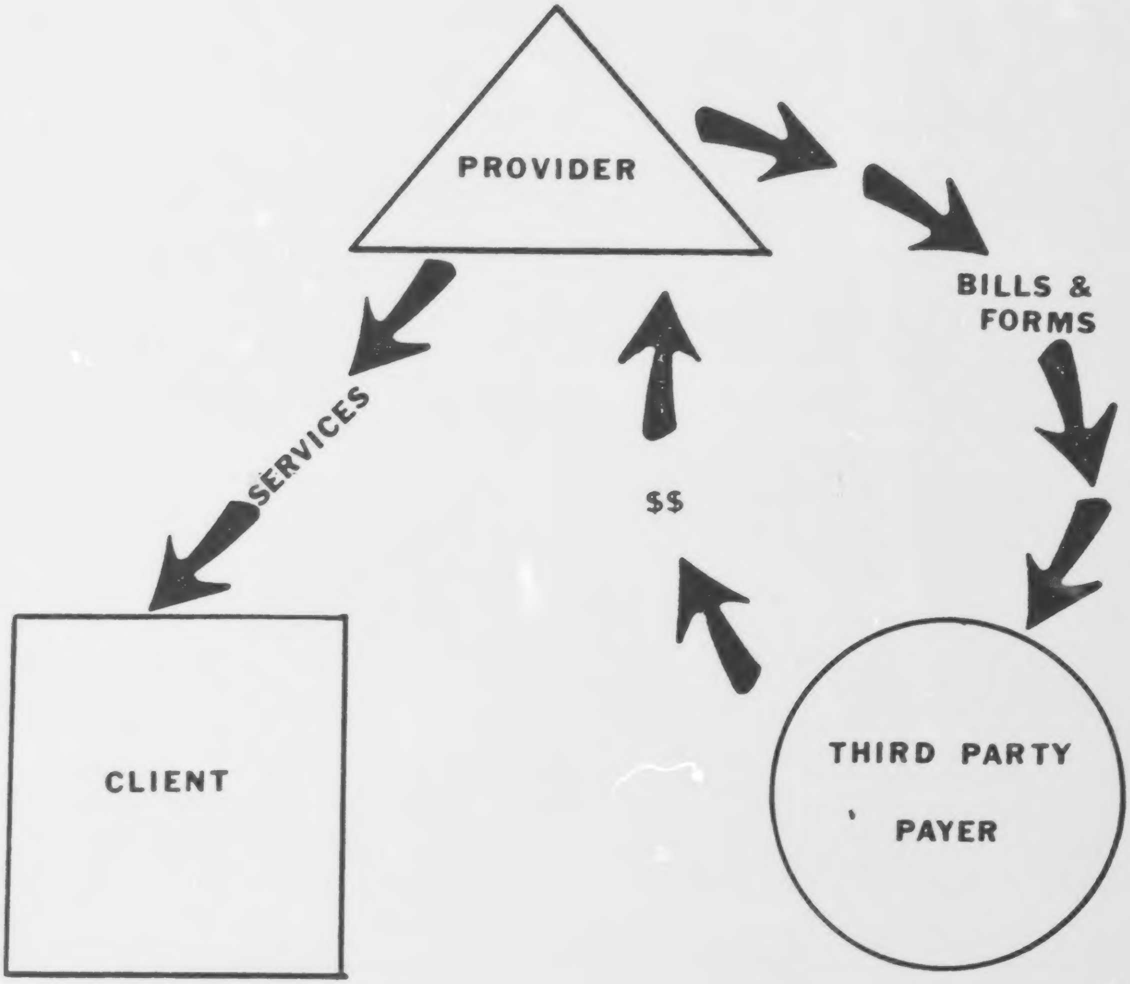
TIME/ FORM	MATERIALS & EQUIPMENT/ REFERENCES	ACTIVITIES
		INTRODUCTION TO THIRD PARTY PAYMENTS (CONT'D)
	pp. 23-26	• List some of the benefits offered a drug treatment program by third party payments, for example: Sources for required "match" funds Reduction of dependency on a single funding source Expansion or improvement of the program Preparation for National Health Insurance Improved program credibility
15 min. LG D		DISCUSSION • Conduct discussion about implications for treatment programs of TPPs. *The purpose of this discussion is to help you identify important issues relating to TPPs (e.g., charging clients, staff requirements, confidentiality, record keeping, etc.)* • Identify those issues that will be discussed in the course. • Answer any questions.

COURSE CONTENT

- INTRODUCTION
- HSF REGULATIONS
- KEY ISSUES
- THIRD PARTY PAYERS
- CONFIDENTIALITY
- MANAGEMENT & STAFF ISSUES
- FINANCIAL MANAGEMENT
- PROJECT/SSA PLANNING

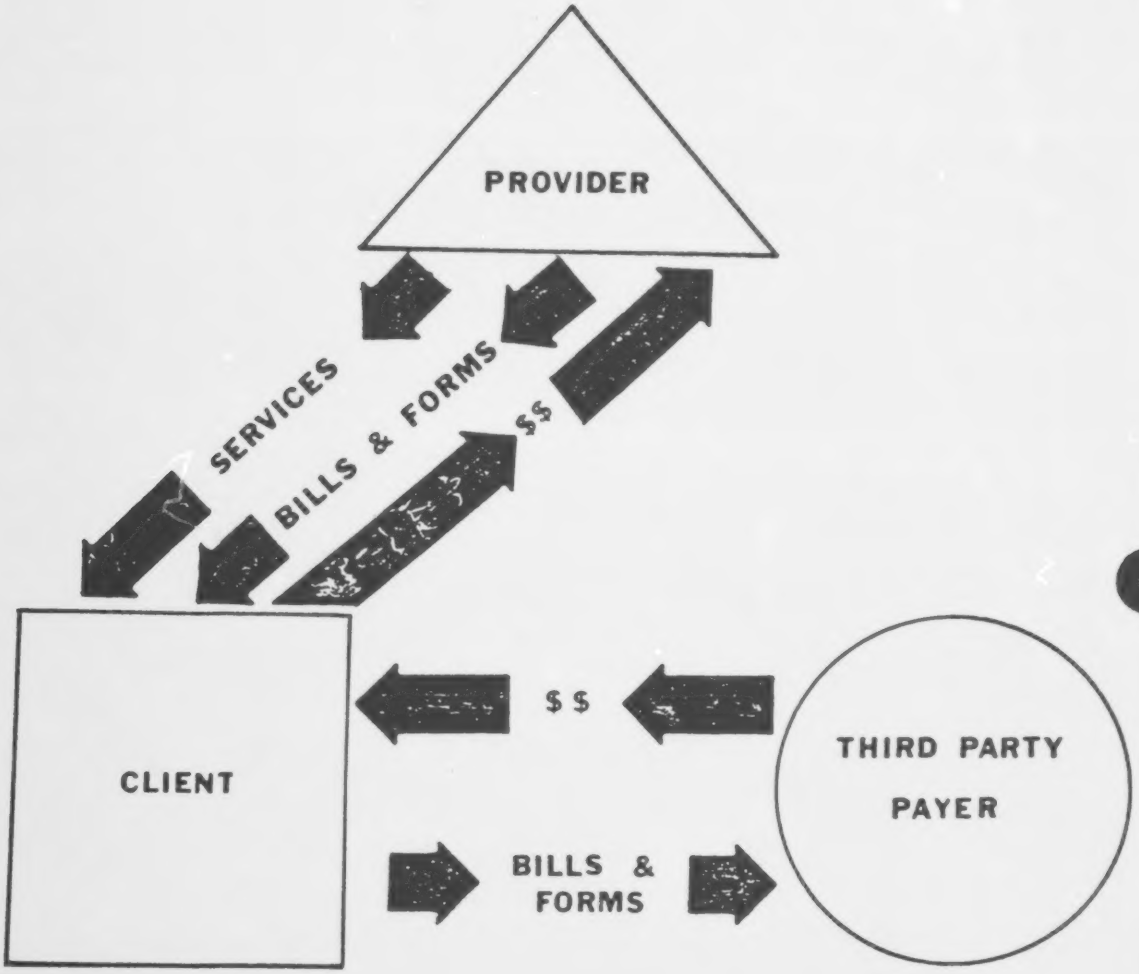
Sample Flip Chart F-1

DIRECT REIMBURSEMENT OF SERVICE PROVIDER



Sample Flip Chart F-2

INDIRECT REIMBURSEMENT OF SERVICE PROVIDER



Sample Flip Chart F-3

WORKSHEET IX-4
INDIVIDUAL PRESENTATIONS

As each individual makes his/her presentation, take notes in the space provided below. Then fill out the two feedback forms that follow.

FEEDBACK ON TRAINING DESIGN

Please circle the number, next to each question, that most closely approximates your perceptions of the training design. If you wish to comment, space has been provided below each question.

	Needs Much Improvement					*Excellent*
How well did--						
1. the training goal reflect the training need selected?	0	1	2	3	4	5
2. the behavioral objectives relate to the training goal?	0	1	2	3	4	5
3. the behavioral objectives specify:						
terminal behavior?	0	1	2	3	4	5
criteria?	0	1	2	3	4	5
conditions?	0	1	2	3	4	5
4. Were the behavioral objectives realistic?	0	1	2	3	4	5

FEEDBACK ON TRAINING DESIGN: continued

How well did--	*Needs Much Improvement*					*Excellent*
5. the learning tasks relate to the behavioral objectives?	0	1	2	3	4	5
6. each training method lead to accomplishment of the behavioral objectives?						
Method #1	0	1	2	3	4	5
Method #2	0	1	2	3	4	5
Method #3	0	1	2	3	4	5
7. the time periods indicated in the design match the actual time required in delivery?	0	1	2	3	4	5
8. the materials and equipment facilitate learning?	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S)

NAME OF TRAINER: ____________________

Please circle the number next to each question that most closely approximates your perceptions of the trainer. If you wish to comment, space has been provided below each question.

How well did the trainer--	*Needs Much Improvement*					*Excellent*
1. state the objectives? (Comment)	0	1	2	3	4	5
2. help the group to understand the purpose of what they were doing as they went along? (Comment)	0	1	2	3	4	5
3. give instructions? (Comment)	0	1	2	3	4	5
4. explain or clarify information? (Comment)	0	1	2	3	4	5
5. encourage discussion by asking good questions? (Comment)	0	1	2	3	4	5

FEEDBACK TO THE TRAINER(S): continued

How well did the trainer--	*Needs Much Improvement*					*Excellent*
6. encourage discussion by letting others speak? (Comment)	0	1	2	3	4	5
7. encourage and accept criticism from others? (Comment)	0	1	2	3	4	5
8. show sensitivity to the group's feelings and needs? (Comment)	0	1	2	3	4	5
9. help the participants to share their ideas and experiences with one another? (Comment)	0	1	2	3	4	5

Any general comments or suggestions?

MODULE X

MODULE X: FORMAL AND INFORMAL EVALUATION: PROVIDING CLOSURE

RATIONALE

Although it is often taken for granted, a major trainer role is to help trainees evaluate what they have gotten so that they are able to use new knowledge and skills. Often, this evaluation is informal, occurring through ongoing processing of knowledge gained and experience. Sometimes, it is formal, as with posttests which may be written in the form of simulation. Sometimes they are extremely informal, as with exercises to provide closure for the training itself.

In this module, concepts of evaluation--formal and informal, ongoing and final--will be presented to build trainees' knowledge and skill in evaluating the effectiveness of training.

SYNOPSIS

This, the final module of the TOT, opens with the trainer's overview of the activities and objectives (5 minutes).

The module is focused on formal and informal evaluation re-entry issues. A very brief (10 minute) trainer lecture outlines the parameters of these issues and leads into guided small group discussions (30 minutes). The final activity of the module is one exercise or a series of exercises that facilitates expression of feelings and closure of the TOT (1 hour).

This is followed by the module wrap-up and critique. Finally, the course's Posttest takes place at the end of this final module. (See the Pretest and Posttest section at the back of this Trainer Manual.)

MODULE X: FORMAL AND INFORMAL EVALUATION: PROVIDING CLOSURE

TIME: 2 HOURS 50 MINUTES

GOALS

- To impart knowledge of evaluation procedures
- To enable trainers to experience closure and to begin to build a model for closing their own training events
- To give all participants an opportunity to get feedback from the group for themselves.

OBJECTIVES

At the end of this module, participants will be able to:

- Describe at least two techniques that move a group to closure
- Describe at least one technique for coping with re-entry difficulties
- Define the following terms:
    - Reaction
    - Learning
    - Behavior change
    - Results.
- Name one formal and two informal means of evaluation.

MATERIALS

- Flip chart or newsprint
- Easel/tape
- Felt-tip markers
- Participant Manual
- Photocopies of the Posttest and the Posttest Answer Sheet

MODULE X: FORMAL AND INFORMAL EVALUATION: PROVIDING CLOSURE

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
10 MINUTES	1. MODULE OVERVIEW ● State that since this course tries to model an ideal training event, this, the last module, is designed to help participants: - Continue to pull together--integrate--their learning; - Become conversant with evaluation techniques; - Begin to look at how to use evaluation techniques; - Leave the training environment in a way that maximizes what they are able to take home. ● Preview the activities to be accomplished and discuss their relationship to the module objectives.
20 MINUTES	2. LECTURE: FORMAL AND INFORMAL EVALUATION ● Acknowledge that evaluation occurs throughout the design, development, and delivery phases of training. For example, when: - Assessing learning needs - Pilot-testing a course - Determining whether objectives are met. ● Give examples of formal evaluation: - Walk through some of the samples in the Participant Manual (pre-, post-, attitudinal). - Discuss domains of learning in relation to formal evaluation. NOTE: Cognitive learning might be tested by multiple choice or true-false questions; attitudinal change or learning might use a

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
	scale; and psychomotor might use simulation of work sample. • Review some of the informal evaluations of this course by initiating: - Discussions about whether objectives were met - Discussions as to whether parts of the course model appropriate behaviors, materials, methods - Closure issues (to be discussed below).
Selected Readings X-2 through X-5	• Refer participants to Selected Readings X-2 through X-5 for background information on evaluation.
20 MINUTES	3. DISCUSSION: EVALUATION • Ask participants to devise a formal evaluation tool for the learning piece they presented in Module IX. • Parallel the selection of a means to evaluate learning to the selection of an appropriate methodology. Have participants keep in mind the appropriate learning domain. • After 10 minutes, lead a discussion which enables participants to share some of the evaluation exercises they have come up with. Allow questions and comments to be voiced in the large group.
20 MINUTES	4. LECTURE: CLOSURE AND RE-ENTRY • Develop a brief presentation on closure and re-entry issues. The following are points to highlight: - Every training event needs closure--termination is a natural part of almost every interpersonal activity requiring processing of what has occurred in order to move on to something else.

- When an activity has been particularly intense and/or sufficiently different from day-to-day experiences (as with, for example, a 3-day therapy marathon) the issue of re-entry comes up. The term re-entry is used because going back to the everyday world is experienced as difficult, less rewarding, or even as a return to a hostile environment.

- Attention to "re-entry issues" is important at the close of any intense experience. It is extremely important not only to do, but to model, so that participants will attend to this issue with their own groups of trainees when necessary.

- Participants often need a structure for dealing with complex issues of:

  a) Built-up intimacy and attachments

  b) Intense positive or negative feelings about training content, personnel, and/or the learning itself

  c) Transition back home where family members or fellow staff may have felt deserted, left behind, or rejected.

Selected Reading X-5
Reference Sheet X-1
Reference Sheet X-2

- Outline some of the parameters for the "re-entry" problem before opening these issues up for discussion. Helpful information can be found in Selected Reading X-5, "Taking Learning Back Home," and in Reference Sheet X-1, "Laundry List of Re-entry Issues," both of which appear in the Participant Manual. (The bibliography for this module, Reference Sheet X-2, may also be helpful.)

- Let participants know that to bring this TOT to an end, a discussion of several exercises to bring about closure will be engaged in. In addition, if in the trainer's judgment the group needs a re-entry experience for their own learning or for anticipated difficulties, a re-entry exercise can be added.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
30 MINUTES	5. DISCUSSION: DEPROGRAMMING FOR CLOSURE An important task that all participants will have to engage in over the next weeks and months is an evaluation of their experiences and learning during the TOT and what will be meaningful and usable to them back home. To help them begin this process: ● Facilitate a discussion that helps participants address the following questions: - How do you see putting to use what you learned during the TOT? - How might your learning in the TOT be put to use in training particular courses or packages you are called upon to train? - How will your experience and learning be received by your boss? By your future trainees? - Do participants feel that the Participant Manual will be a help to them? What would they like to add to it? - How might others--spouse, roommate--see your sojourn at training? - What other courses or opportunities for career development are open to you? - As a final activity, what kind of closure does this group need or want to choose? What kind of preparation for re-entry?
30 MINUTES	6. OPTIONAL EXERCISES: DEPROGRAMMING FOR RE-ENTRY ● Before the formal course evaluation and other formal closing activities begin, you may lead an optional closing and/or a re-entry exercise, which has a twofold purpose: it gives participants an opportunity to express feelings primarily about each other before leaving, and it provides closure.

NOTE: If you choose not to conduct one or more of the three optional exercises described below, this module will only be 1 hour, 50 minutes long instead of 2 hours, 20 minutes.

- Whatever exercise or exercises are chosen, allow a few minutes at the end for group members' comments. Lengthy processing is not necessary.

Newsprint
Tape
Felt-tip Markers

Optional Exercise A

- Develop some mini-case-study type quotes such as the ones below. Place them on newsprint around the room.
  - "What do you mean the week made you feel very loving?...Here I was taking care of three kids by myself and you...."
  - "You went to TOT last month. How come you're still doing boring lectures?"
  - "Now we can't have any of that reflective therapy-type stuff in this setting."
  - "I wanna take the trainer home with me."
  - "Can we schedule a reunion of the TOT group in 6 months?"

Worksheet X-1

Optional Exercise B

Another optional exercise is a sentence completion exercise (Worksheet X-1) such as:

- "I think what is going to happen when I go home is that...."

Optional Exercise C

Yet another technique is that of a silent goodbye that allows some physical contact as the group mills around.

TIME, MEDIA, AND MATERIALS	*OUTLINE OF TRAINING ACTIVITIES*
10 MINUTES	7. MODULE OUTCOMES • Facilitate a discussion as to the extent: - That this module enables participants to meet its objectives - To which this module successfully modeled the kind of training event facilitators want to engage in.
30 MINUTES	8. ADMINISTERING THE POSTTEST NOTE: Materials for the Posttest are contained in the back of the Trainer Manual only, in the Pretest and Posttest section. You will need to have adequate numbers of photocopies of the Posttest and Posttest Answer Sheet made in advance of delivering Module X.
Copies of Posttest and Posttest Answer Sheet	• Pass out photocopies of the Posttest and Posttest Answer Sheet. • Read the Posttest instructions. • Administer the test, pointing out that participants' answers should be entered on the Answer Sheet. Remind participants to write their names on the top of the Answer Sheet before turning it in. • Thank participants for their work.
	END OF MODULE X

WORKSHEET X-1
GUIDED DISCUSSION

PURPOSE:

To provide a structure through which participants can anticipate what awaits them upon their return home.

MATERIALS:

None

INSTRUCTIONS:

Take turns completing the following sentence:

"I think what is going to happen when I go home is ______________________."

TIME:

20 minutes

REFERENCE SHEET X-1
"LAUNDRY LIST" OF RE-ENTRY ISSUES

- Anticipation of reception at home by spouse, significant other(s), roommate.
- Anticipation of reception of colleagues, boss, clients.
- Feelings about TOT group and leaving it.
- Finding a network for continuing professional growth.
- Feelings about living and learning in a close environment--attractions, disadvantages.
- Achieving closure.
- Strategies for change in one's own training behaviors (action planning).

REFERENCE SHEET X-2
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GLOSSARY OF TRAINING TERMS

GLOSSARY OF TRAINING TERMS

ACCEPTANCE NEEDS: a phrase referring to an individual's desire to be liked and accepted.

ACCOUNTABILITY: responsibility. In training, accountability requires that the desired results be specified (in behavioral terms) and that responsibility for achievement of the behavioral objectives be assumed by both trainers and trainees.

ACHIEVEMENT NEEDS: a phrase referring to an individual's desire to successfully perform tasks. (See TASK-ORIENTED.)

ADAPTIVE: showing ability to adjust to the environment. The term was originally used to describe an individual; it is now also applied to groups and organizations. Generally, this term is used to summarize a number of specific actions or events that indicate an individual's ability to adjust to his environment.

AFFECTIVE LEARNING OBJECTIVE: a behavioral objective requiring a change in attitude, values, interest, appreciation, motivation, etc.

AMBIVALENCE: simultaneous attraction toward and repulsion from an object, person, or action. When one says he or she is ambivalent, he may mean that his feelings are mixed or that he is confused.

ASSESSMENT: estimate, appraisal. The first step in the training process, an assessment is made to identify the training needs.

AUDIENCE REACTION TEAM: generally consists of two to five participants who react to a presentation.

AUTHORITY: power to direct or influence a group that is derived either from one's role in the group, or from having information that other group members do not have access to.

BACK HOME: jargon used in training to refer to the job or situation from which a participant has come and to which he or she will return. One might speak of "back-home" problems.

BEHAVIOR CHANGE: a change in the way one conducts oneself; used in training to refer especially to a desired change in job performance.

BEHAVIORAL OBJECTIVE (also LEARNING or PERFORMANCE OBJECTIVE): a specific statement of the change in knowledge, skill, or attitude expected as a result of training. It should be stated in terms of performance and should be measurable. Behavioral objectives must include a description of the expected behavior, the criteria (to what degree of proficiency the learner should perform the behavior), and the conditions under which the behavior will be demonstrated.

BRAINSTORMING: a free-wheeling technique where creative thinking is more important than practical thinking. Participants spontaneously present ideas on a given topic. No idea is dismissed or criticized. Anything offered is written down. This technique is used to generate as many ideas as possible; participants stimulate each other's thinking. After listing of ideas is completed, the group clarifies, categorizes, or discusses one item at a time--depending on the situation.

BRIDGING ACTIVITIES: activities that assist individuals to translate relating from one situation to another. For example, an action planning activity at the end of a training session serves as a bridge to the work environment.

BUZZ GROUP (SMALL-GROUP DISCUSSION): a technique that involves members of a training group directly in the discussion. The large group is divided into small groups of three or four persons each for brief discussions in which each trainee contributes his or her ideas.

CASE STUDY: a detailed account of a real or hypothetical occurrence (or series of events) about a problem. Usually the problem is one that trainees might encounter on the job. The case is analyzed and discussed, and trainees are often asked to arrive at a plan of action to solve the problem. Case studies can be presented verbally, in writing, on film, or with any combination of media.

CLINIC: a meeting or extended series of meetings involving analysis and treatment of specific conditions or problems.

CLINICAL: an orientation toward reality usually involving a desire to deal with wholes and concrete facts, rather than with parts and concrete facts. A clinical orientation usually involves an attempt to solve problems rather than to merely analyze them.

CLOSED-LOOP SYSTEM: a system that continually functions in this established pattern.

CLOSURE: a sense of having reached a natural stopping place, a feeling of completion.

COGNITIVE APPROACH: an approach involving knowledge and perception. This term is applied to an intellectual rather than emotional approach.

COGNITIVE LEARNING OBJECTIVE: a behavioral objective that requires trainees to remember facts, figures, methods, policies, etc., or to solve some intellectual task, by determining the essential problem and reordering or combining the information with previously acquired knowledge.

COLLOQUY: a modified version of a panel consisting of three or four resource persons and three or four trainees. The trainees express opinions, raise issues, and ask questions that will be discussed by the resource persons. (See PANEL.)

COMMITTEE: a committee consists of a small group of trainees selected to fulfill a function or perform a task that cannot be done efficiently or effectively either by the entire training group or by one person.

CONFERENCE: a meeting of people in large or small groups. The participants usually consult together in a formal fashion on problems to which they give the most serious consideration.

CONFRONTATION: the process by which one person attempts to make another person aware of aspects of his own behavior, usually without consideration of that person's desire for feedback. The phrase, "a confronting style," is sometimes used to describe a person who habitually gives such feedback to others.

CONGRUENT: in agreement with, fitting, or appropriate. (For example, if you are teaching people how to write behavioral objectives, then the behavioral objective of your training session must be congruent with the criteria you teach.)

CONSENSUS: a decision-making process in which all parties involved agree to the final decision. It does not mean that all parties are completely satisfied with the final outcome, but that the decision is acceptable.

CONSORTIUM: an association, society.

CONSULTANT: a resource person; one who has special skills or expertise in a specific area and is brought in temporarily to assist in training or other activities.

CONSULTATION: a discussion between two or more people in which one of the people provides technical assistance. Included are telphone conversations, letters, and on-the-job visits. (See TECHNICAL ASSISTANCE.)

CONTENT: the subject matter--information, concepts, principles, or skills. Communication consists of two levels--content (what is being communicated) and process (feelings about oneself and others during the communication.)

CONTEXTUAL ELEMENTS: a group member's relationships outside the group. Contextual elements include physical and social contacts, emotional relations, contractual relations, and cultural interchange.

CONVENTION: an assembly of people from local groups who are members of a parent organization, either district, State, or national.

CORRESPONDENCE COURSE: a self-instructional course using print and/or nonprint materials as the educational media. Such courses may include tutorial or small group sessions, consultations from a trainer, written assignments, examinations, and grades.

COUNTERDEPENDENT: a technical term in personality theory that refers to behavior that is overly independent. A counterdependent person consistently resists the authority, structure, and leadership of others.

COURSE: an organization of subject matter and related learning experiences provided for the instruction of trainees on a regular or systematic basis, usually for a predetermined period of time (e.g., a semester, a regular school term, or a 2-week workshop).

COVERT: hidden.

COVERT INTENT: the aim or purpose is not easily observable. Can refer to a behavioral objective in which the desired behavior is not necessarily visible; for example, thinking, adding, solving, discriminating.

COVERT RESPONSE: a reaction that is not necessarily visible; for example, discriminating, understanding, and fantasizing.

CRITERION REFERENCED: (See NORM REFERENCED.)

CRITERION TEST: a test designed to measure mastery of a behavioral objective based on a predetermined standard of achievement. This test focuses on job performance capabilities rather than on details of content that are not essential to job performance.

CRITERION TEST ITEM: a written and/or actual performance item that is used to measure the achievement of an objective and is based on a predetermined standard.

CRITICAL INCIDENT: a contrived or dramatized educational experience in written, audio, and/or visual form that simulates real-life events. It generally requires trainee to make decisions and act these out in a laboratory setting. It is often used to give trainees experience in handling interpersonal situations that may arise on the job. For example, the technique could be used to teach foremen how to handle a recalcitrant employee, or to teach interviewers how to obtain information from prospective employees.

CUE: An indirect message, often nonverbal, that indicates a certain feeling, desire, or state of mind. They are often unintentional hints, but they may be given on purpose.

CULTURE: a technical term with many definitions. It is used typically to refer to a behavior characteristic of a group or class.

CURRICULUM: the planned course of study, involving trainee interaction with instructional content, resources, and processes for the purpose of attaining the behavioral objectives.

CURRICULUM DEVELOPMENT: a part of the training design process, involving selection of content, development of learning tasks, and organization of the content.

DEFENSIVE: resisting or preventing potential or actual aggression or attack.

DEMONSTRATION METHOD: a presentation that shows how to use a procedure or how to perform certain actions. Basically it is a visual presentation, accompanied by discussion, in which behavioral skills are taught.

DEPENDENT: subordinate; relying on another for support; being influenced by or subject to another.

DEVELOPMENTAL TESTING: part of the validation process in which the training design is successively tested and revised to identify and correct weaknesses. Revisions are made after each test until the acceptable standard is achieved. (See FORMATIVE TESTING.)

DISCUSSION: a method in which a specific topic is talked about in a more or less structured way. It may take several forms--roundtable discussion, guided-group discussion, buzz groups, panels, brainstorming, etc.

DISCUSSION GROUP: a meeting of two or more people to informally discuss a topic of mutual concern. It is generally based on a common background achieved through assigned readings or shared educational experiences.

DISCUSSION STIMULATOR: anything used to bring about a discussion, such as a picture, a quote, a case study, a questionnaire, a list of ambiguous statements which trainees are asked to agree or disagree with, a true-or-false test, a tape recording, a statement, a movie, etc.

DOMAIN OF OBJECTIVES: an indication of the type of learner performance specified in the behavioral objective.

COGNITIVE OBJECTIVE: those statements specifying the acquisition of particular knowledge or information.

AFFECTIVE OBJECTIVES: those statements specifying the acquisition of particular attitudes, values, or feelings.

PSYCHOMOTOR OBJECTIVES: those statements specifying the acquisition of particular muscular and motor skills.

DYAD: pair; two people.

DYNAMICS: the driving physical, moral, or intellectual forces of any area or the laws relating to them; the pattern of change or growth of an object or phenomenon.

DYSFUNCTIONAL: impaired or abnormal functioning.

EDUCATIONAL GOALS: general statements of what the training should accomplish. They are developed from the needs assessment and are used to write specific behavioral objectives.

EIAG PROCESS: a structured way of learning from experience that forms the basic model for the design of most training sessions. This four-step process is based on the concept that people learn best by being actively involved in their own learning. The learner has an experience, identifies the elements of that experience, analyzes why the elements occurred as they did, and generalizes about the knowledge and skills acquired in this specific situation so that they can be applied in other situations.

EMPATHETIC: from empathy; to be capable of participating in another's feelings or ideas.

ENTRY-LEVEL SKILLS AND KNOWLEDGE: the level of skills and knowledge the trainee brings with him or her to training. Training should be designed to bridge the gap between the entry-level skills and the job performance requirements.

ENTRY PROCESS: jargon phrase for the highly complex set of conditions by which a consultant begins to exert influence. The entry process involves important actions separate from the main work of the consultant, although they are naturally closely related.

ENVIRONMENT: used to refer to the physical and social context within which any person, group, or organization functions.

EVALUATION: evaluation of training involves the measurement of participants' reaction to the program, the learning gained, changes in job-related behavior, and tangible results of the training.

FORMATIVE EVALUATION: yeilds information that is used during the development of a curriculum to help improve it.

SUMMATIVE EVALUATION: is conducted after the curriculum is completed. It provides information about the effectiveness of the training and is the basis for course revision.

EXERCISE: A patterned activity used in a group to promote awareness of learning. Exercises can be used to demonstrate or practice a concept, or to cause the participants to become more aware of themselves or their interactions with others. (See STRUCTURED EXPERIENCE.)

EXHIBIT: collections of related items displayed to facilitate learning process or to carry an educational, informational, or inspirational message.

EXPECTATIONS: participants' anticipations about content or the group situation.

EXPERIENTIAL: a term for a kind of learning process in which the content is experienced as directly as possible, in contrast to being read about in a book or talked about in lecture and discussion. The term applies to a wide variety of training techniques.

FACILITATE: to make easier; to help bring about. In training, to help bring about the maximum amount of cognitive, affective, and psychomotor learning.

FEEDBACK: a report to a person or a group about how the person or group affects the reporter. Feedback is a corrective mechanism through which a person or group learns how well behavior matches intentions.

FIELD TESTING: a stage in the validation process, following developmental testing, that involves trying out the training design on groups of trainees in field situations or in the work environment.

FIELD TRAINING: training that is conducted in the actual work situation. It is used in conjunction with classroom instruction and allows trainees to apply what has been learned.

FIELD TRIP or TOUR: a visit by a training group to a place of educational interest for direct observation and study. Field trips usually involve less than 4 hours, while tours include visits to many points of interest and require from 1 day to several weeks to complete.

FISHBOWL: an experiential training technique in which some members of a group sit in a small inner circle and discuss a topic while other members sit in an outer circle and observe. It is useful as an intergroup training technique. Sometimes each member of the outer group is instructed to observe a particular member of the inner group.

FLIP CHART: a visual aid that consists of large sheets of paper mounted on a pad. (Each sheet is easily flipped over to reveal the next sheet.) Usually refers to collections of charts or illustrations used during demonstration-lectures. Also used to refer to blank pads of newsprint paper used instead of a blackboard. Sheets are easily torn off and taped on walls for a record of the discussion or lecture.

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FOLLOWUP EXPERIENCE: a phrase referring to a carefully planned activity that follows and reinforces training.

FORCE-FIELD ANALYSIS: a training technique for analyzing problems. It consists of listing, side by side, forces that seem to be helping and forces that seem to be hindering the achievement of a stated goal (or resolution of a problem). This listing helps to clarify and define the problem. In addition, possible strategies for dealing with the problem are usually made clear: those forces that help achievement of the goal should be encouraged or strengthened, while those that hinder this achievement should be eliminated or weakened.

FORMATIVE TESTING: testing of trainees during the training process that measures the degree of attainment of the behavioral objectives.

FORUM: an assemblage of trainees where everyone has an opportunity to express his or her views. This expression of views is used to facilitate discussion after a topic has been introduced by a speaker or by a panel, film, or other technique.

FREE DISCUSSION: a discussion that encourages the expression of attitudes and values. The purpose of this discussion is to recognize and clarify differences within the group so that they can be reconciled.

FREEING-UP: jargon, referring to the process by which an individual is able to become less defensive, more open, more "free." It is related to Kurt Lewin's use of the term "unfreezing" to describe the first step in any change process.

FREEZE: to limit oneself to a single, narrow mode of behavior or perception, while at the same time failing to see other possible modes.

FRONT END ANALYSIS: (See NEEDS ASSESSMENT.)

FUNCTIONAL: that which facilitates the attainment of goals.

GAMES: may refer to various techniques used to make certain phenomena more real and immediate. For example, games have been employed to simulate conflict, bargaining, leadership struggles, group norms, etc.

GATEKEEPING: a term used in group dynamics to describe a person who regulates interaction patterns by asking people for their ideas, suggesting to others that they talk less, etc.

GESTALT: a school of thought in psychology. Phenomena are studed and interpreted as patterned wholes rather than as aggregates of parts. It has had major effects on contemporary personality theory. It is now used as a shorthand way of referring to an overall view of anything: a "big picture" approach, e.g., "My gestalt on the issue is...." It is also used increasingly to refer to a collection of techniques that are purported to help people identify and then reorganize their own view of reality.

GOAL: a general statement of what the training should accomplish. Goals are developed from the needs assessment and are used to write behavioral objectives. (See also EDUCATIONAL GOALS.)

GOAL-SETTING: to establish the aim or desired result of training.

GROUP: three or more persons who share the following characteristcs:

- The members think of themselves as a group with an identifable membership.
- They share a common purpose.
- Each member's contributions are valued.
- An open and trusting climate develops.
- The members pay attention to how they work together.
- They can, when they choose to, act together as a single entity.

GROUP DYNAMICS: the study of the forces at work within a group that affect the way it works.

GROUP MAINTENANCE: those behaviors exhibited by group members that help maintain harmonious working relationships among members.

GROUP PROCESS: the actual behavior in a group. It is concerned with how things happen (who talks to whom, how participants develop roles, how decisions are made, how the group handles conflict) rather than what is talked about.

GROWTH: a widely used term, reflecting theorists' and practitioners' concern fo improvement in personal, group, and organizational behavior. It is constantly i danger of becoming an ideological cliche. Identification of growth stages, rates, and directions is a major focus of contemporary theory and research.

GUIDED-GROUP DISCUSSION: a structured discussion whose purpose is to cover certain predetermined areas or points. Using an outline or list of "discussion points," the trainer guides the discussion to be sure desired information is shared and discussed.

GUT LEVEL: jargon to describe statements involving feelings or emotions, as opposed to head level.

HELPING RELATIONSHIP: derives from the "client-centered" therapies introduced by Carl Rogers and others. It is used to describe a relationship established to help someone increase his or her ability to cope. It is distinguished from other possible relationships that one could establish with another person; e.g., a casual friendship, etc.

HERE-AND-NOW: a phrase describing the focus of attention on the present; e.g., a focus on what is happening as it occurs.

HIDDEN AGENDA: a personal expectation or motivation which affects how that person behaves in a group or feels about a group, but which is now known to others in the group. A person may have a hidden agenda or a private goal not necessarily identical with the group's goal.

INFLUENCE: the power to cause an effect on others in indirect or intangible ways. As a verb, to have an effect on the condition or development of something or someone.

INFORMATION SHEETS: commonly called "handouts." Information sheets are learning aids given to trainees in support of a presentation. They may be in narrative or outline form, written by the trainer, or copied from published materials.

INPUT: one's contribution to a system, particularly in the form of ideas.

INSTITUTE: a series of events that is designed to assist a trainee to change his or her behavior in order to meet specified behavioral objectives.

INSTRUCTION: a series of events that is designed to assist a trainee to change his or her behavior in order to meet specified behavioral objectives.

INSTRUCTIONAL AIDS: (See TRAINING AIDS.)

INSTRUCTIONAL DESIGN: (See TRAINING DESIGN.)

INSTRUCTIONAL DEVELOPMENT: the application of research concerning the learner, the learning task, and the training delivery to the design and production of instructional products and the evaluation of these products according to prespecified criteria.

INSTRUCTIONAL GOALS: (See GOAL.)

INSTRUCTIONAL LEVEL: an indication of the general nature and difficulty of instruction; e.g., elementary instructional level, secondary instructional level, and postsecondary instructional level.

INSTRUCTIONAL MATERIALS: (See MATERIALS.)

INSTRUCTIONAL MEDIA: (See MEDIA.)

INSTRUCTIONAL MODULE: (See MODULE.)

INSTRUCTIONAL OBJECTIVES: (See BEHAVIORAL OBJECTIVE.)

INSTRUCTIONAL PACKAGE: everything needed to carry out the training. In self-instructional programs, this would include everything the trainee would need to proceed with the course.

INSTRUCTIONAL PRODUCT: any material or group of materials produced for instructional purposes; use of this term in educational technology is limited to items that can be reproduced.

INSTRUCTIONAL SEQUENCE: determination of the particular order in which skills and concepts will be presented during training. Decisions regarding sequencing are based on the previous analyses of the learner, task, and content.

INSTRUCTIONAL SYSTEM: a system containing the following elements (activities):

- Needs Assessment
- Goal Development
- Statement of Behavioral Objectives
- Training Design
- Training Activity
- Evaluation
- Validation

INTERACTION: virtually any behavior resulting from interpersonal relationships. In human relations it includes all forms of communication, verbal and nonverbal, conscious and unconscious.

INTERPERSONAL: the generic term for relations between persons--usually two. It is a prefix for many phrases, such as interpersonal relations, interpersonal aspects, interpersonal conflict, etc.

INTERVENTION: an interruption of a group activity that influences the direction, content, behavior, or affect of the group.

INTERVIEW: a presentation in which one or more resource persons responds to questioning by one or more trainees. It is used to explore a topic in-depth where a formal presentation is not desired by either trainees or resource persons.

JUDGMENTAL: expressing an opinion or evaluation that is believed or asserted.

LAB: a shorthand term for any of a wide variety of programs that derive from the "laboratory method of training," an approach that is primarily experiential. The term "lab" has been added to describe many types of training; e.g., "Conflict Lab," "Personal Growth Lab," etc.

LABORATORY METHOD: a basic training approach in which learning comes from both the task and the behavior of trainers and participants in the group. A central concept of the laboratory method is that feelings influence learning; therefore, this method of training attempts to deal with emotional reactions as well as with knowledge and skills.

LEARNER ANALYSIS: the identification of the intended audience for an instructional product, and of the significant traits, aptitudes, and proficiences of that audience.

LEARNER TASK ANALYSIS: an identification of the main skills to be acquired by the learner and the breakdown of these skills into their basic components. It indicates the performance and knowledge requirements for a particular skill.

LEARNING: a change in behavior as a result of practice or experience. The change can be through acquisition of knowledge, attitudes, or skills based on learning in the cognitive, affective, or psychomotor domains.

LEARNING ACTIVITIES: actions or activities that result in an internalized change of behavior or response on the part of the person performing the actions or activities.

LEARNING CONTRACT: a plan of instruction, adaptable to individual differences, in which the course content is divided into a number of long-term assignments. The student receives a contract and is allowed to proceed from one step to the next as each is completed.

LEARNING DEFICIENCY: the difference between the minimum (criterion-referenced) level of performance required and the actual performance of the trainee prior to training.

LEARNING OBJECTIVE: (See BEHAVIORAL OBJECTIVE.)

LEARNING PACKAGE: (Also called PROGRAMMED INSTRUCTION), a self-contained unit of study that enables the learner to move at his or her own pace to reach specified learning objectives.

LECTURE: a carefully prepared, formal, oral presentation of a subject by a qualified expert. An effective lecture will have a clear introduction and a clear summary, and will be limited to what is important.

LECTURE SERIES: a sequence of speeches extended over a period of several days or presented intermittently during several weeks or months.

LECTURETTE: a short informative talk on a limited subject during which questions and comments are discouraged. In training, the purpose is usually to stimulate discussion, summarize preceding discussion, or comment on a specific event.

LEVEL OF PERFORMANCE: a predetermined degree of proficiency to be attained during training.

LISTENING TEAM: a team that listens, takes notes, questions the presenters, and/or summarizes a training session. The team is used to provide interaction between a speaker and the trainees and is especially useful where the speaker is not especially knowledgeable about an agency's unique problems.

LISTING EXERCISES: a form of discussion in which a group devises a list of ideas, concepts, etc., and discusses each item as it is suggested. The finished list constitutes a record and summary of the discussion.

MANAGEMENT-BY-OBJECTIVES: a management strategy developed by Odione that makes the establishment and communication of organization objectives the central function of a manager. It is based on the assumption that supervision and leadership will work best under conditions in which both superiors and subordinates have "contracts" (i.e., agreements) establishing directions, priorities, and objectives.

MASTERY: a demonstration of behavior by the trainee in which he or she shows that he has achieved a specified level of learning.

MATERIALS: anything used in the training process; for example, books, films, papers, or other training aids.

MATRIX: a chart that is used to display the relationship between variables.

MEASURE: a unit of measurement to which reference may be made for purposes of description, comparison, and evaluation.

MEDIA: any means of conveying an instructional message; a channel of communication used to facilitate learning; for example, television, videotape, printed test, graphics.

MEDIATED INSTRUCTION: instruction that is conducted with communications media rather than through direct interaction of the teacher with the student.

METHOD: a basic approach to instruction; for example, lecture, site visit, programmed instruction, and small group discussion.

METHOD, DEMONSTRATION: (See DEMONSTRATION METHOD.)

METHODOLOGY: the organization of methods to achieve specific learning outcomes.

MINICOURSE: a self-contained instructional package dealing with a single concept or skill.

MODEL: a description or analogy used to help visualize something; an example for imitation or emulation.

MODULE: a unit of instruction that covers a specific content area within a given period of time. (See UNIT OF INSTRUCTION.)

MOTOR OBJECTIVE: (See PSYCHOMOTOR LEARNING OBJECTIVES.)

NEED HIERARCHY: as described by Abraham Maslow, needs are arranged in a hierarchy from the most basic biological needs to more variable psychological needs. The highest level is self-actualization. The theory says that "higher" needs cannot be realized until "lower" needs are relatively satisfied. The theory has led to a variety of shorthand phrases for describing "where a person is" in the need hierarchy at a given time; e.g., "esteem level," "social level," "security level," etc. This particular theory was also the basis for McGregor's THEORY X--THEORY Y formulation.

NEEDS: a central concept in psychology, referring to all of the biological and psychological requirements for the maintenance and growth of the human animal; something which an individual or group feels it must have in order to achieve a sense of well being.

NEEDS ASSESSMENT: an appraisal of the existing situation in the work environment, including any interpersonal problems or any lack in knowledge or skills on the part of prospective trainees. The final part of the process is an analysis of those needs to determine how they may best be met.

NEWSLETTER: a document that may include an announcement or report. It is mailed to many people and often carries training information. It is a trainer's way of personally communicating with many people.

NONDIRECTIVE: the name for a method of interviewing first introduced by Carl Rogers. He used it to refer to therapy in which the patient is in charge of the pace, content, and direction of the interchange. The term is now used to refer to any similar approach used by a person in authority; e.g., a teacher or trainer.

NONVERBAL: involving minimal use of language; being other than verbal. It has come to refer to a number of training techniques that do not use language; for example, body movement.

NORM: a principle of right action established by a group and binding upon the members of that group that serves to guide, control, or regulate proper and acceptable behavior. A standard by which members of a group are evaluated.

NORM REFERENCED: the assessment of learner performance in a given area in relation to the performance of some norm or reference group. This is distinguished from criterion referenced, which refers to assessment of performance based on an established standard or criterion.

OFF-SITE: away from the regular place of work.

ON-SITE TRAINING: training conducted in the office or center where the trainees are based. On-site training is not the same as field training or on-the-job training where trainees are in an actual work situation.

ON-THE-JOB TRAINING: training that takes place while the trainee is actually doing his or her job under supervision. It differs from field training only slightly in that field training is usually part of a larger program in which trainees apply their training on the job, then return to the classroom to share and discuss what they have learned. (See FIELD TRAINING.)

OPEN-LOOP SYSTEM: a dynamic system with feedback capability that has a continuing influx and output of information.

ORIENTATION: adjustment and familiarization to a situation or environment, such as to a new job or new responsibilities.

OVERT: visible, manifest.

OVERT RESPONSE: observable behavior that is measurable; the level at which the learner can demonstrate a skill.

OWNERSHIP: jargon for the quality of feeling personally committed and hence presumably entitled to influence a situation, as in "I feel some ownership in this program."

PANEL: a training method involving a discussion among four to eight people on an assigned topic in front of the training group. Panel members are often experts in the field under study, but usually represent various backgrounds or opinions. A moderator ensures that order is maintained, that each resource person gets equal time, and that the topic is covered in depth.

PARTICIPANT (LEARNER, TRAINEE): the person from whom the training activity is created and to whom it is presented.

PARTICIPANT-OBSERVER: a group participant who acts as an observer for all or a portion of a training session. In this role he observes and records the activities of other members and then describes these to the group.

PARTICIPATORY TRAINING: the absolute or comparative levels of behavior required to determine achievement of specified behavioral objectives.

POSTTEST: a type of test given at the end of a unit of instruction that measures the amount of information learned by the trainees during that session. The questions are based on the behavioral objectiyes and the course content for that unit. The word "posttest" can also be used to describe any type of evaluation measure given after training. These measures can be written, verbal, or a demonstration of skills. They are used to determine how well the trainees have attained the objectives and help identify what changes should be made in the training to improve it. The posttest may also serve as a diagnostic tool to identify remaining performance deficiencies.

POWER: the ability to exert influence over a group or over an individual in making decisions, establishing norms, or performing an activity.

PRETEST: an assessment made before instruction to determine the level of knowledge or skill that a learner brings to instruction. The questions deal with the factual material that is included in the training program. Results are compared to those of the posttest to measure the amount of learning accomplished during training.

PROBLEM-ORIENTED TRAINING: training geared to the actual problems that face the people being trained; emphasis is on practicality, not theory.

PROCESS: as a component of communication, the feelings about oneself and others during the communication. Also, a continuing development involving changes; a particular method of accomplishing a task, usually involving a number of steps. In training, process means the steps through which the trainees learn.

PROCESS ELEMENTS: internal and external influences that affect the group process.

PROGRAMMED INSTRUCTION: a self-instructional teaching format, using print and/or materials as the training medium. Questions are ordered in such a way that correct knowledge is reinforced and mistakes or errors corrected. Examples include programmed textbooks, teaching machines, computer-assisted instruction, and dial-access information retrieval systems.

PROTOTYPE: a near-final model of an instructional product that is tested to determine what modifications of structure and performance are necessary. Based on the success of the prototype, decisions are made concerning the continuation and possible mass production or reproduction of the model.

PSYCHOMOTOR LEARNING OBJECTIVES: a behavioral objective emphasizing motor or muscular skills, or neuromuscular coordination, usually involving manipulation of material or objects.

QUESTION PERIOD: an organized followup session to a lecture or speech in which trainees ask the lecturer questions. It is during this time that trainees ask for clarification of points made in the formal presentation, and ask for information that was not covered by the speaker but is of interest to them.

REACTION PANEL: several trainees placed between the lecturer and the audience and to the side of the lecturer. This panel asks questions during the lecture to clarify the speaker's points. After the lecture, they present their reactions as a group. This is a device to encourage audience involvement in the lecture.

RE-ENTRY: jargon for the process of moving back into one's work situation from a temporary training situation.

RESOURCE PERSON: an individual whose role in a group is to provide information on a subject that the group is interested in.

RESULT DEMONSTRATION: a demonstration that shows by example the concrete outcome of a practice. It often deals with operational costs, production procedures, or with the quality of a product, and generally requires a considerable period of time to complete.

ROLE: a position assigned or assumed; a function.

ROLE PLAYING: a training technique in which a small group of trainees acts out a real-life situation in front of the other trainees. Role playing may be rehearsed beforehand in order to produce a specific effect; it may be spontaneous in order to allow the trainees to define their roles within a specific situation; or it may be structured by the trainer, who will assign specific roles to the trainees. There is no script. Those trainees not assigned a role discuss the performance in relation to the situation or problem under consideration. The training also offers criticisms and suggestions.

ROUNDTABLE DISCUSSIONS: discussions usually involving 8 to 12 participants, all of whom are considered equally "expert." The leader may or may not be the trainer. The leader's role is limited to monitoring participation and keeping the discussion focused on the topic.

SELF-ACTUALIZATION: a phrase quite widely used to refer to the process by which an individual reaches the highest level of functioning of which he or she is capable. More concrete definitions are difficult in that, theoretically, self-actualization is different for every person. Self-actualization is the top level in Maslow's need hierarchy. (See NEED HIERARCHY.)

SELF-AWARENESS: a positive goal of most training techniques that aim at behavior change. Self-awareness means becoming aware of one's existing patterns of behavior in a way that allows one to compare these with other behavior patterns wthout reacting defensively.

SELF-CONCEPT: refers to the picture one holds of oneself. This is a collection of feelings, hopes, and beliefs that would be difficult to define. A major object of self-awareness is to identify one's self-concept more accurately and completely.

SELF-INSTRUCTIONAL PACKAGES: packages that contain all the instructional materials needed for independent study of a course.

SEMINAR: a type of discussion group, usually led by a recognized expert who engages in a discussion among a group of trainees studying a specialized topic. The leader generally opens the seminar with a brief presentation, often covering provocative issues, and then guides a discussion in which all trainees participate.

SENSITIVITY TRAINING: methods for improving the individual's sensitivity to himself or herself and others. Although variations exist, common ingredients seem to be: (l) the guidance of a trained person or persons; (2) intense interpersonal experience by the trainee; and (3) a relatively protected environment, free from ordinary pressures and distractions.

SEQUENCE: the order in which different aspects of the instructional program are presented.

SESSION: an ambiguous term that usually refers to a portion of a training program; e.g., "the morning session," "the first day's session." Generally it is used to refer to a period of time of a day or less.

SET: a preparatory adjustment or readiness for a particular kind of action or experience.

SHORT COURSE: a period of intensive training on a specific subject, usually simpler and less concentrated than courses taken for college credit, but having more depth than the single meeting.

SIMULATED TASK ANALYSIS: identification of job performance requirements in an artificial setting (e.g., in a class) using knowledge of jobs and the imagination.

SIMULATION: a contrived educational experience, in audiovisual or model form, that has the characteristics of a real-life situation. Simulation allows the trainee to make decisions or take action in a laboratory setting prior to interacting with people and things in a real-life situation. Examples include driver/trainer simulators, and educational "games" such as Monopoly, Blacks and Whites, or CLUG (Community Land Use Game) that require actions by the trainees.

SKILL: technical expertness, proficiency; the ability to use one's knowledge effectively and readily in performing or executing something; a developed aptitude or ability.

SKILL-BUILDING: refers to anything that promotes proficiency or expertness.

SKIT: a brief, rehearsed, dramatic presentation involving two or more trainees. Working from a prepared script, the trainees act out an event or incident that dramatizes a situation.

STRATEGY: a planned series of activities that involves the choice of one approach over another.

STRUCTURAL: pertaining to the structure of an organization as it is described in organizational charts, job descriptions, and task assignments.

STRUCTURED EXPERIENCE: an experience that is designed to achieve a certain purpose. The written design must include a goal statement, a description of the process, a notation of group size and time and materials required, and a description of the physical setting.

SUMMATIVE TESTING: (See EVALUATION.)

SUPPORT PERSONNEL: those persons who provide assistance in the training effort. They may be working in the areas of recruitment, field services, accounting, facility management, material procurement, A-V, library, public relations, evaluation, or research.

SYMPOSIUM: a series of prepared lectures given by two to five resource persons, each speaker presenting one aspect of the topic. The presentations should be brief and to the point, and should generally not exceed 25 minutes.

SYSTEM: an organized assemblage of interrelated components designed to function as a whole to achieve predetermined objectives.

SYSTEMS APPROACH: a manner of designing and evaluating systems that minimally includes specification of objectives in measurable terms, restatement of objectives in terms of capabilities and constraints, development of possible approaches, selection of appropriate approaches as a result of a tradeoff study, integration of the approaches, and evaluation of the effectiveness of the system in attaining objectives.

SYSTEMS THEORY (GENERAL SYSTEMS THEORY): describes the relationship between complex interacting components and organized wholes. (See OPEN-LOOP SYSTEM and CLOSED-LOOP SYSTEM.)

TARGET AUDIENCE: that portion of the total learner population selected for exposure to instruction. This group is generally identified in terms of certain common social and/or learning characteristics.

TASK GROUP: a group of people who work together to complete a specific task.

TASK LEADER: a role that commonly emerges in any group, the task leader is the person who exercises the most influence on the way the group attempts to accomplish its main task.

TASK-ORIENTED: mostly interested in accomplishment of the task.

TEACHING: the term commonly used to indicate face-to-face instruction. Teaching is usually subject-oriented, whereas training is problem-oriented--designed to solve a specific problem.

TEAM: a number of persons associated together in work or activity.

TEAM-BUILDING: improving relations within a group or team.

TECHNICAL ASSISTANCE: the provision of technical services in response to a request.

TECHNIQUE: activities that are used as a tool within a certain method. More general in nature than exercises, techniques are not an end in themselves. Examples are brainstorming, using a fishbowl, pairing, and using audiovisual aids.

TECHNOLOGY: a standardized, communicable way of achieving a practical purpose. It is used increasingly in organizational development to refer to ways of making interventions, as in "team-building technology."

THERAPY: an activity that has as its purpose the improvement of the physical and/or mental functioning of a person.

TRAINER: one who conducts training. This term may also be applied to one who develops a training program. Trainers should be able to conduct needs assessments, develop training, and conduct and evaluate training.

TRAINING: a sequence of experiences; a series of opportunities to learn in which one is exposed in a more or less systematic way to certain materials or events.

TRAINING ACTIVITIES: the actual learning experience to which a trainee is exposed during training. Training activities can include use of different methods and techniques such as: guided-group disucssions, buzz groups, written exercises, lectures.

TRAINING AIDS: these convey information and ideas to participants by appealing to their senses of sound, sight, and touch. Training aids can greatly facilitate the learning process. Some examples are flip charts, overhead projectors, etc.

TRAINING DESIGN: a detailed, step-by-step plan that describes how learning will take place during the training. It is an arrangement of methods into a detailed plan for a training session. A functional training design should include: (1) behavioral objectives; (2) what the trainee will learn--the topic to be covered, task to be performed, or activity to be undertaken; (3) how the trainee will learn--description of the methodology; (4) time allotted for accomplishing the methodology; and (5) materials and/or equipment needed.

TRAINING MATERIALS: (See MATERIALS.)

TRAINING PACKAGE: (See INSTRUCTIONAL PACKAGE.)

TRAINING PROCESS: Includes four phases--needs assessment, development, delivery, and evaluation.

UNIT OF INSTRUCTION: a unit of instruction is a planned series of learning activities or experiences that has: (1) predetermined, stated objectives; (2) a definite beginning and a definite end; (3) a specified learner population; and (4) some specified means of assessing the learning that has taken place as a result of the interaction between the learner and the unit of instruction. Although no particular length is prescribed for a unit of instruction, it is usually thought of as shorter in length than a course.

VALIDATE: to confirm the soundness of; to verify.

VALIDATED INSTRUCTION: instruction that has been shown to do what it was intended to do.

VALIDATION: the process of developmental testing, field testing, and revising a training activity to be certain its behavioral objectives are achieved.

VALUES CLARIFICATION: a process which helps an individual identify his or her basic values. This process often involves using exercises.

VALUING: showing preference for selected activites; becoming committed.

WORKSHOP: a training method that permits extensive study of a specific topic. Fifteen to 20 people meet together to improve their proficiency, to collectively develop new operating procedures, or to solve problems.

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PRETEST AND POSTTEST

PRETEST AND POSTTEST INSTRUCTIONS

This section contains two sets of test items. Form A, the Pretest, contains 15 true/false questions and is to be administered to all participants who take this course. Form B, the Posttest, contains 15 multiple choice items to be completed by each participant at the end of the course.

Instructions for Test Administration

The Pretest and Posttest are included in the Trainer Manual only. The following are the procedures for administering each of the tests.

- Prior to actual training delivery, detach Forms A and B from the Trainer Manual.
- Duplicate (by photocopying or any other suitable method) one copy of Forms A and B for each participant scheduled for training.

Pretest (Form A)

- After registration of participants, but prior to any part of the training delivery, have each participant complete Form A.
- Collect the completed test forms from participants.
- Score the completed test forms at the earliest time possible using the Answer Key provided.

Note: You are advised to score the test forms in privacy and after the training activities for the first day have been completed.

- Record each participant's score.

Posttest (Form B)

- At the end of Module X, have each participant take the Posttest, recording his or her answers on the Form B Answer Sheet provided.
- Collect the completed test forms.
- Score the test using the Answer Key provided.
- Record Posttest scores.

Test Score Recording Form

The Pretest/Posttest method of evaluation is designed to approximate the learning gain of each participant as indicated by the difference between his/her Pretest and Posttest scores. The Test Score Recording Form contained in the back of this section is provided to facilitate recording and calculating of Pretest and Posttest scores.

Name ______________________________

PRETEST, FORM A

Instructions

Read each of the following statements carefully. Indicate whether the statement is true or false by circling T or F in the column next to each item. Do not guess. If you do not know the correct answer, do not circle either letter.

1. The process of learning for adults is generally the same as it is for children. T F
2. Training is a special form of learning and the trainer's role is the same as a teacher's role. T F
3. The trainer's primary responsibility is to know the answers to any question that the participants might ask. T F
4. Theories of learning are unrelated to training. T F
5. The training group is similar to the classroom, and the trainer must control the process in the group. T F
6. The most important thing for the trainer is to protect his/her integrity against attacks by group members. T F
7. The primary purpose of training trainers is to develop trainer style(s). T F
8. Cultural considerations like race and ethnicity have little or no influence on how people respond to training. T F
9. Training is a special form of facilitating learning of cognitive material through exercises. T F
10. The letters EIAG in training mean energy, industry, action, group. T F
11. Trainers should observe and intervene only when the participants request intervention. T F
12. Trainers should intervene periodically just to reinforce his/her position as the authority in the training event. T F
13. Packaged training materials reflect the state-of-the-art in training and should not be modified by trainers. T F
14. Good training need not be subject to special evaluation. T F
15. The most important test of a training event is how the participants feel when it is over. T F

ANSWER KEY
FORM A (PRETEST)

1. F
2. F
3. F
4. F
5. F
6. F
7. F
8. F
9. F
10. F
11. F
12. F
13. F
14. F
15. F

POSTTEST, FORM B

Instructions

These are multiple-choice items. Each subset has instructions; in each instance, circle the letter representing the best answer.

On the answer sheet, circle the best answer to the following questions:

1. A functional training design must include:

   a. behavioral objectives, core curriculum, what, how, time, and a bibliography

   b. behavioral objectives, title of session, what, how, and materials and equipment

   c. behavioral objectives, what, how, time, and materials and equipment

   d. behavioral objectives, what, how, time, and training aids

   e. objectives (cognitive or behavioral), what, how, time, and a bibliography

2. "... a sequence of experiences, a series of opportunities to learn, in which... (you are) exposed in a more or less systematic way to certain materials or events" is the definition of:

   a. learning

   b. methodology

   c. training

   d. training design

   e. programmed instruction

3. A training design is important because it helps the trainer to carefully develop:

   a. a logical, sequential, step-by-step training session

   b. an evaluation based on results

   c. core curriculum

   d. learning tasks

   e. media presentations

4. Choose the answer that is the least important reason why a needs assessment should be conducted:

   a. because staff members must achieve the performance standards set for their jobs

b. because time, money, and effort can be wasted through training that is not based on valid present or emerging needs

c. so people will be happier and be ready for advancement

d. to increase knowledge and skills; to explore attitudes that may be hindering staff members' effectiveness

e. all are equally important

5. Choose the response that includes at least three methods that are most effective for building skills:

   a. buzz groups, lectures, brainstorming, programmed instruction

   b. informal open-ended discussion groups, simulations, role-plays, demonstrations

   c. lectures, panels, films, readings

   d. simulations, videotape feedback, demonstrations, programmed instruction

   e. brainstorming, demonstrations, guided group discussions, slide/tape presentations

6. Learning is frequently thought of as a composite of:

   a. skills, abilities, and knowledge

   b. knowledge, skills, and attitudes

   c. practical experience, information, and abilities

   d. sensitivity, education, and knowledge

   e. education, attitudes, and abilities

7. Lectures, panels, films, and readings are methods that are best applied when:

   a. building skills

   b. changing attitudes

   c. communicating information

   d. reinforcing what has already been learned

   e. all of the above

8. Pretests and posttests are used to evaluate

   a. behavior change

   b. learning

c. reaction

d. results

e. opinion

9. Select the answer that contains at least three climate interventions:

a. clarify goal(s); humor to ease tension; remain silent to build tension or encourage group participation; suggest a division of labor for tasks needed to complete job

b. offer an analysis and/or clarification of material that has been covered so far; movement from a question to an exercise to intensify climate; a story or analogy to illustrate a point; diagram or write out what has been spoken to provide clarity and/or focus

c. remind group members of why they need to complete their task (e.g., to get an earlier break, or it's required before the next step can occur); identify resources that might be useful; review critical issues

d. silence to build tension or encourage group participation; trainer self-disclosure to bring out trainees' attitudes and feelings; empathy for verbal and nonverbal climate; observe how much time is left, or, if the group members didn't budget their time, suggest that they do so

e. summarize material; identify resources; remain silent to encourage group participation; trainer self-disclosure

10. Select the response that includes at least three methods that are most effective in changing attitudes:

a. buzz groups, lectures, brainstorming, programmed instruction

b. informal open-ended discussion groups, simulations, role-plays, demonstrations

c. lectures, panels, films, reading

d. simulations, videotape feedback, demonstrations, programmed instruction

e. informal open-ended discussion groups, brainstorming, programmed instruction, panels

11. The four phases in the training process are:

a. delivery, evaluation, design, and needs assessment

b. development, evaluation, presentation, and needs assessment

c. evaluation, design, development, and needs assessment

d. needs assessment, evaluation, development, and delivery

e. either c or d

12. Which of the following is the primary purpose of training (as defined in the TOT)?

    a. to facilitate more effective communication

    b. to provide personal growth

    c. to teach new information

    d. all of the above

    e. none of the above

13. Which of the following items does not include at least three phases of group development?

    a. dependency, intragroup conflict, interdependence

    b. orientation, organizing to get work done, problem-solving

    c. dependency, organizing to get work done, interdependence

    d. all of the above

    e. none of the above

14. Which of the following items includes only the task functions members perform in groups?

    a. coordinating, encouraging, elaborating, gatekeeping, giving opinion

    b. encouraging, gatekeeping, standard setting, following, expressing group feeling

    c. giving information, giving opinion, initiating activity, seeking opinion, seeking information

    d. initiating activity, expressing group feeling, seeking opinion, following, seeking information

    e. none of the above

15. "Present information in a clear, understandable sequence, beginning with the basic ideas that make up more complicated concepts. Tell the learner what your goal is and how you expect to get there."

    Choose the principle that best illustrates the training design guideline written above:

a. "Cognitive feedback confirms correct knowledge and corrects faulty learning. The learner tries something...and then accepts or rejects what he does on the basis of its consequences."

b. "Generalization and discrimination suggest the importance of practice in varied contexts, so that learning will become... appropriate to a wider... range of stimuli."

c. "Reinforcement is important; that is,...desirable or correct responses should be rewarded."

d. "The organization of knowledge should be an essential concern of the teacher or educational planner so that the direction from simple to complex is not from arbitrary, meaningless parts to meaningful wholes, but instead from simplified wholes to more complex wholes."

Name ______________________________

ANSWER SHEET
FORM B (POSTTEST)

1. A B C D E
2. A B C D E
3. A B C D E
4. A B C D E
5. A B C D E
6. A B C D E
7. A B C D E
8. A B C D E
9. A B C D E
10. A B C D E
11. A B C D E
12. A B C D E
13. A B C D E
14. A B C D E
15. A B C D E

ANSWER KEY
FORM B (POSTTEST)

1. C
2. C
3. A
4. C
5. D
6. B
7. C
8. B
9. D
10. B
11. D
12. E
13. E
14. C
15. D

TEST SCORE RECORDING FORM

Course Title ______________________ Date ______________________

Participant Name	Pretest (Form A)	Posttest (Form B)	Difference (Form A-Form B)

Trainer(s) Signatures:

____

____

____

(CONTINUED FROM INSIDE FRONT COVER)

- Participant Manual

  The Participant Manual has two primary purposes: 1) to provide resources that are essential to understanding course content, and 2) to provide materials that enable participants to be actively involved in the learning exercises.

- Other Materials

  The following list represents the minimum materials required for the course. Visuals are provided in the modules of this manual and can be used as overhead transparencies or as a guide in preparing flip chart training aids.

  - Flip chart(s) and easel(s)
  - Newsprint
  - Felt-tip markers
  - Masking tape
  - Pencils
  - Legal pads or paper
  - Participant Manuals
  - Overhead projector
  - Participant list
  - Registration sheet
  - Photocopies of Pretest, Posttest, and the Posttest Answer Sheet (one per participant).

SPACE REQUIREMENTS

This course requires one large workroom (suitable to 20-24 participants) equipped with chairs and tables, or chairs and a suitable writing surface. The room should be sufficiently large so that participants are uncrowded and reasonably comfortable.

Two smaller rooms (sufficient to accommodate a maximum of 8-10 persons) are also required for small group activities. These rooms should also be equipped with a chair and a suitable writing surface for each participant.

LENGTH OF COURSE AND EVALUATION

Training of Trainers is designed as a 5-day, 35 contact-hour course. At a minimum, an additional 5 hours will be required to complete supplementary reading assignments.

Two standards are used to evaluate each participant's performance in this course: 1) attendance at the course delivery sessions, and 2) the score on the posttest. Participants who are certified as having successfully completed the course must have been present for not less than 32 of the 35 scheduled hours and must achieve a score of not less than 75 percent on the posttest.